

LEARNER  
INSIGHTS



# The Next Decade In Learning

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The UK's biggest learner survey

# Foreword

**T**he workplace is undergoing a huge transformation with today's workforce the most distributed and diverse our society has ever seen. By 2025, Millennials will make up around 75% of the workforce. As workplace demographics continue to shift, learning needs to shift as well.



**PHILIP PYLE,**  
**CHIEF REVENUE OFFICER,**  
**KALLIDUS**

What do learners really want from their learning experience? And how can learning and development be improved as we head into the next decade of learning?







The learner is at the heart of everything we do at Kallidus. This is why we have commissioned the UK's largest independent learner survey to uncover the truth about what is really working for learners today and what they would like to see more of in the future.

The Next Decade in Learning draws on key insights from over 1,000 learners across a wide range of industries and job roles. We designed this to help HR and L&D professionals appeal to every learner in the workplace, embrace technological shifts, and widen the opportunities for learning across generations.

Our report explores key trends from generational interests to expectations of technology in the next decade. It highlights the importance of personalisation and enabling an 'always on' learning culture where every employee can develop the skills they need, when they need them, to be their best. Above all, it shows that the age of people-first learning has arrived.

A handwritten signature in blue ink that reads "Philip Pyle".

# Contents

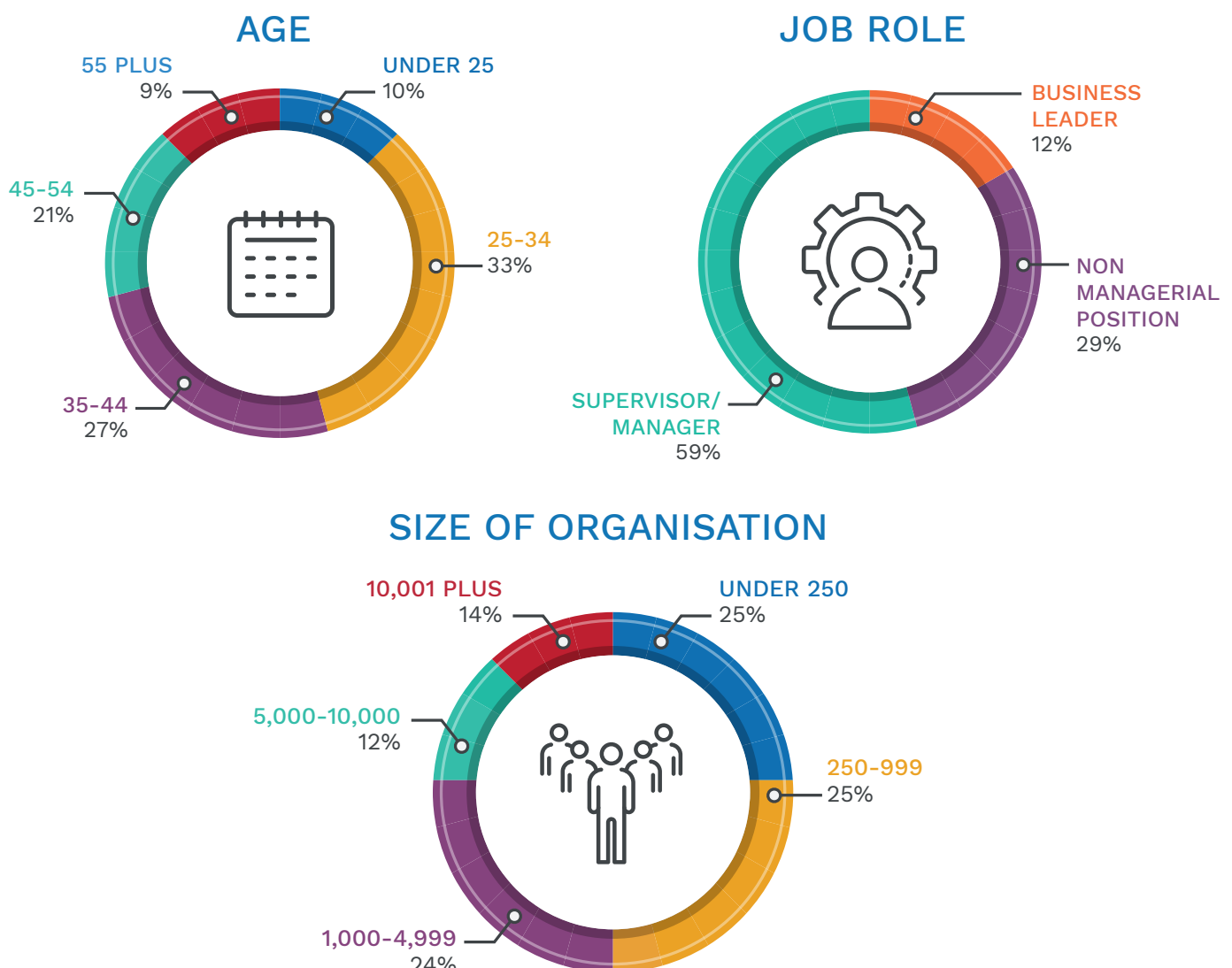
	Foreword	2
	Contents	3
	Methodology	4
	Respondent profile	4
<hr/>		
	<b>Survey snapshot</b>	<b>5</b>
<hr/>		
	<b>Today's learning landscape: current techniques</b>	<b>8</b>
	Learning in the workplace undertaken in the last year	8
	Training techniques currently being used	11
	Effectiveness of today's workplace learning techniques	14
	Effectiveness of engagement techniques in online learning	16
	Training topics covered by current learning techniques	17
<hr/>		
	<b>Today's learning landscape: key motivators and alignments of learning plans</b>	<b>18</b>
	What motivates learners?	18
	Supporting a personalised learning plan	19
	Aligning L&D with personal and business goals	20
	Overall satisfaction with current learning practices	21
<hr/>		
	<b>Looking to the future</b>	<b>22</b>
	L&D practices that learners would like to see improved	22
	Workplace learning techniques people want more of in the next 10 years	23
	How learners would like learning to evolve	24
<hr/>		
	<b>Key takeaways for HR and L&amp;D professionals</b>	<b>25</b>
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# Methodology

We carried out an independent survey in January 2020 amongst 1,012 UK employees working across a wide cross-section of industries in the public and private sector. We collected and analysed the data by age, job role, and size of organisation.

## Respondent profile



# Survey snapshot

**Welcome to the age of people-first learning. Learners have a huge appetite for knowledge and want an ‘always on’ learning culture where they can learn what they want, when they need to, wherever they are.**

Personalisation has never been more important. Employees want more ownership over what they can learn and a learning experience that puts them front and centre. More people are now undertaking personal development training than any other subject, reflecting the rise of the self-focused, knowledge-thirsty Millennial in the workplace.

In today’s increasingly busy workplace, digital learning is more frequently used than ever, and learners want to see even more alongside bite-sized content this decade. But for the time being, in the eyes of the learner, learning that involves the human touch (on-the-job learning, coaching, and classroom) remains the most effective way to learn.

It is clear that learning technologies are continuing to gain ground in workplace learning and, unsurprisingly, tech-savvy Millennials are leading the way in their use of social learning, mobile learning, microlearning, and games. But ultimately, the next decade of learning is about people and culture. While learners want to see more of these techniques in the workplace along with AI, AR, and VR to augment their learning experience, what they want above anything else is greater personalisation and a continuous learning culture.



**It is clear that learning technologies are continuing to gain ground in workplace learning and, unsurprisingly, tech-savvy Millennials are leading the way**

# Workplace learning in 2020

## Training topics, learning techniques, and effectiveness

- More people surveyed (54%) have taken personal development training than any other subject. Compliance is the next most common topic (49%)
- On-the-job training is the most common learning technique (used by 91% of employees) followed by eLearning (82%), coaching (77%), and classroom (70%)
- On-the-job training is the most effective learning technique (cited by 77% of learners) followed by coaching (55%), classroom (54%), and eLearning (51%)
- 49% of learners are now using mobile learning

## The truth about digital learning engagement

- Online learners (60%) are most motivated by the need to pass a test to complete or progress through a course
- Just over a half (53%) of learners are motivated by leader boards
- Learners find badges less motivating than any other gamification techniques – just 41% of learners are motivated by receiving a badge for completing a course

## Generational learning trends

- Millennials are the most prolific users of technology-enabled learning: 67% use social learning, 62% microlearning, 58% mobile learning, 47% games, and 44% VR
- Gen Z are 23% less likely to use mobile learning than Millennials
- Top age brackets to receive more than 10 days of training in the last year are Gen Z (23%) and Baby Boomers (18%)

## Job role learning trends

- Business leaders undertake more learning than anybody, and use the largest variety of training techniques. 45% spend six or more days on learning
- Business leaders are three times more likely to use games and VR than non-managerial staff
- Those in non-managerial positions deem 11 out of 12 learning techniques less effective than those in management/leadership roles

# Workplace learning in the next 10 years

## Personalisation

- 62% of learners want a personalised learning experience
- 76% want more ownership over what and when they learn
- 78% of learners expect more choice of learning, covering more formats and more courses

## Continuous Learning

- 60% of learners want an 'always on' learning culture
- 83% of learners want it to be easier to learn on any device, anywhere, anytime
- 46% of learners want more mobile learning, highlighting the importance of learning-on-demand and at the point of need
- 45% want shorter sessions to fit learning into their working day

## Emerging learning technologies to keep an eye on in the future

- 40% of learners would like VR/AR and AI to become a key part of learning
- 41% of learners would like video learning to become the norm
- 37% of learners would like more gaming in their learning

## Are learners and organisations ready for the future?

- 63% of learners say they are being offered the right training to be effective in the role in the future
- 67% of learners believe their learning is aligned with the skills they will need in the future to be successful in their roles
- 69% can see how their learning aligns with their organisation's business goals



60% of learners want an 'always on' learning culture



37% of learners would like more gaming in their learning



45% want shorter sessions to fit learning into their working day



69% can see how their learning aligns with their organisation's business goals



# Today's learning landscape: current techniques

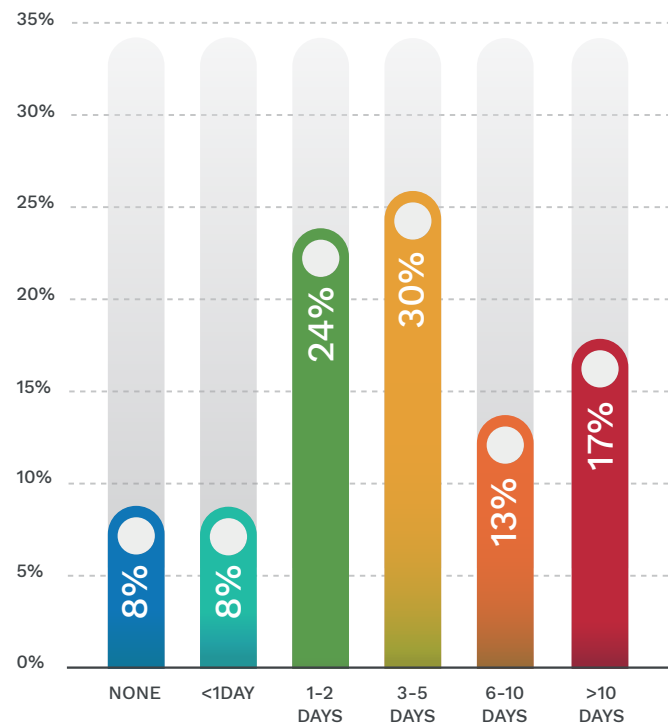
In this section we examine how much time people are spending learning, what techniques they are currently using, how effective and engaging these techniques are, and what subject matter they are studying.

## Learning in the workplace undertaken in the last year

While skills development becomes an evermore important competitive advantage, many organisations continue to face the challenge of doing more with less. So, we wanted to understand how much time people are spending learning in the workplace and who gets the most.

### Learning undertaken, overall sample

- 60% of people are spending at least three days per year learning in the workplace
- The most common amount of time spent learning across the workforce in 2019 was 3-5 days
- 1 in 6 employees spent more than 10 days learning last year



Amount of workplace learning undertaken in the past year

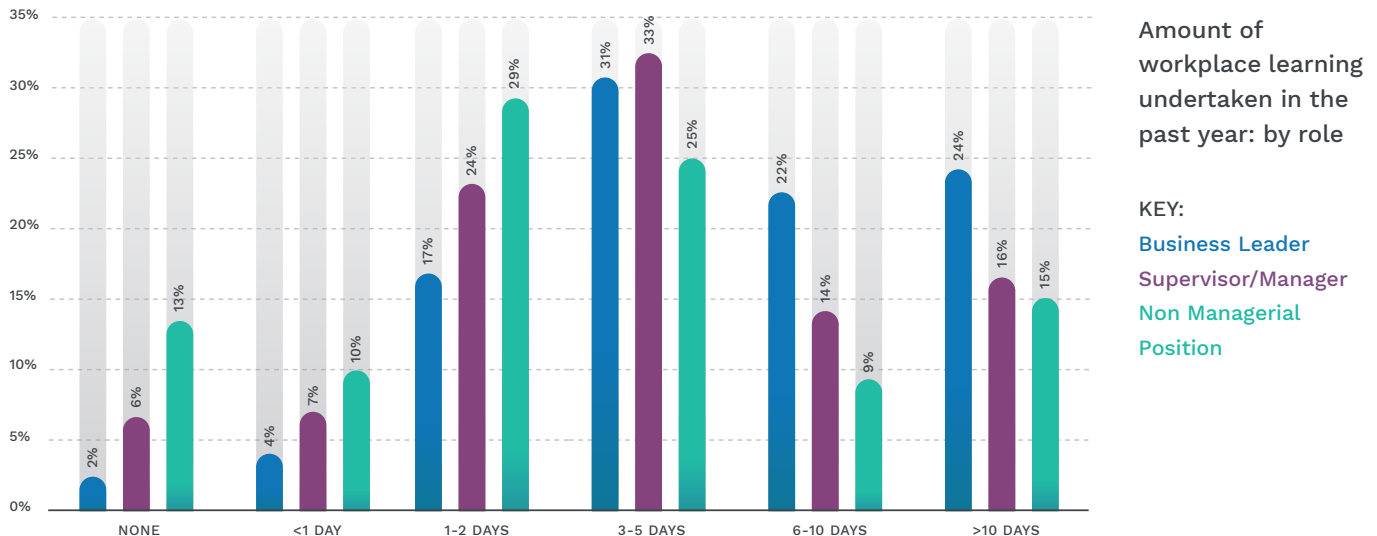
### Learning undertaken, by job role:

- Business leaders are undertaking the highest proportion of workplace learning. 45% are spending 6 or more days on learning and nearly 1 in 4 have undertaken more than 10 days of learning in the past year
- Looking at overall proportions, business leaders are much less likely than any other role to do no learning at all
- Non-managerial employees do the least learning with 13% receiving no training at all last year



- Half (50%) of non-managerial employees have done 2 days or less of workplace learning in the past year

- 49% of non-managerial employees learn for three or more days compared to 63% of supervisors learn and 76% of business leaders



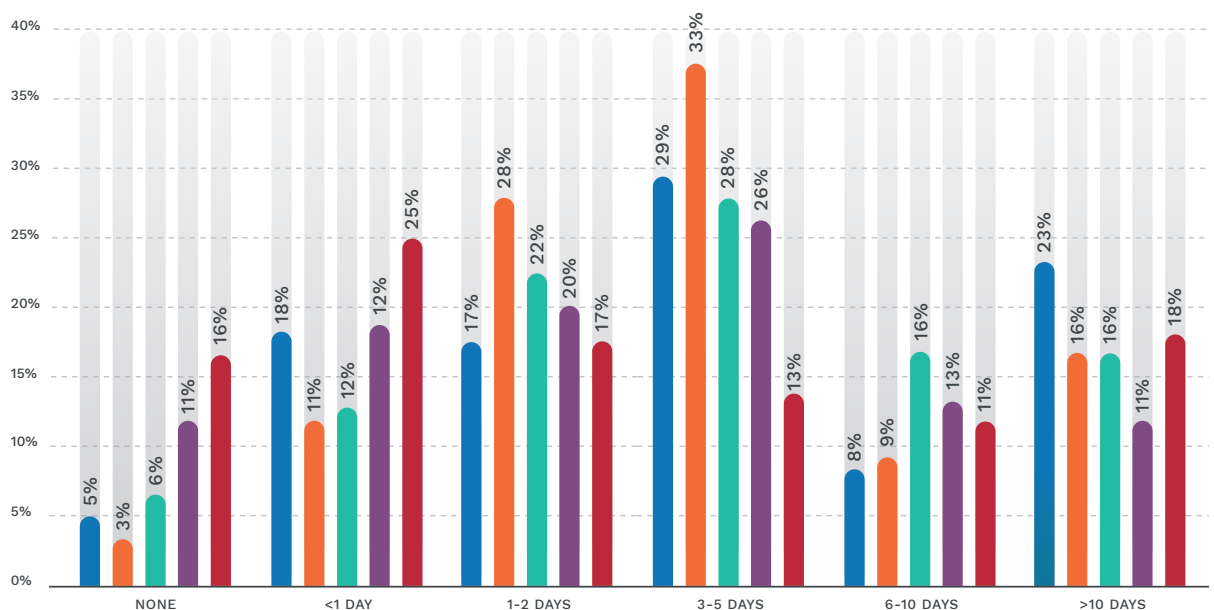
## Learning undertaken, by age

- Above the age of 25, the older you are the more likely it is that you will have had no workplace learning in the last year
- Those aged 55+ are 3 times more likely to have** had no workplace learning compared to those under 25 (16% versus 5% respectively), and 25% of those aged over 55 will have received only 0-1 days of training

- The most common amount of learning taking place across all employees is 3-5 days, however those aged over 55 do not follow this pattern and either very little or significantly more learning
- The top 2 age brackets to receive more than 10 days workplace learning are the youngest (under 25s) at 23% and the oldest workers (55 plus) at 18%

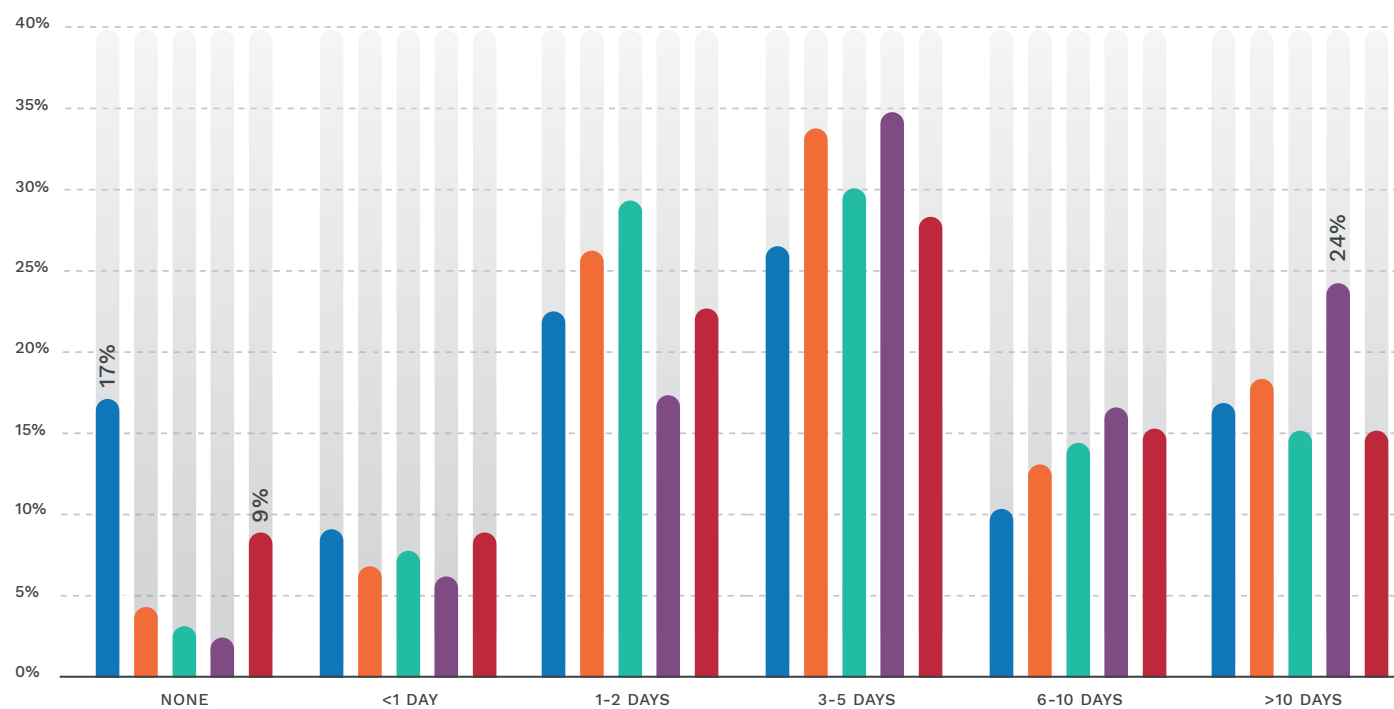
## Amount of workplace learning undertaken in the past year: by age

- KEY:**
- Under 25
  - 25-34
  - 35-44
  - 45-54
  - 55 PLUS



### Learning undertaken, by size of organisation

- Overall, it is the smallest and largest organisations where people are more likely to have done no learning at all in the past year (17% and 9% respectively)
- Organisations employing 5,000 – 10,000 staff have the greatest proportion of people undertaking over 10 days training per year (24%)



Amount of workplace learning undertaken in the past year: by organisation size

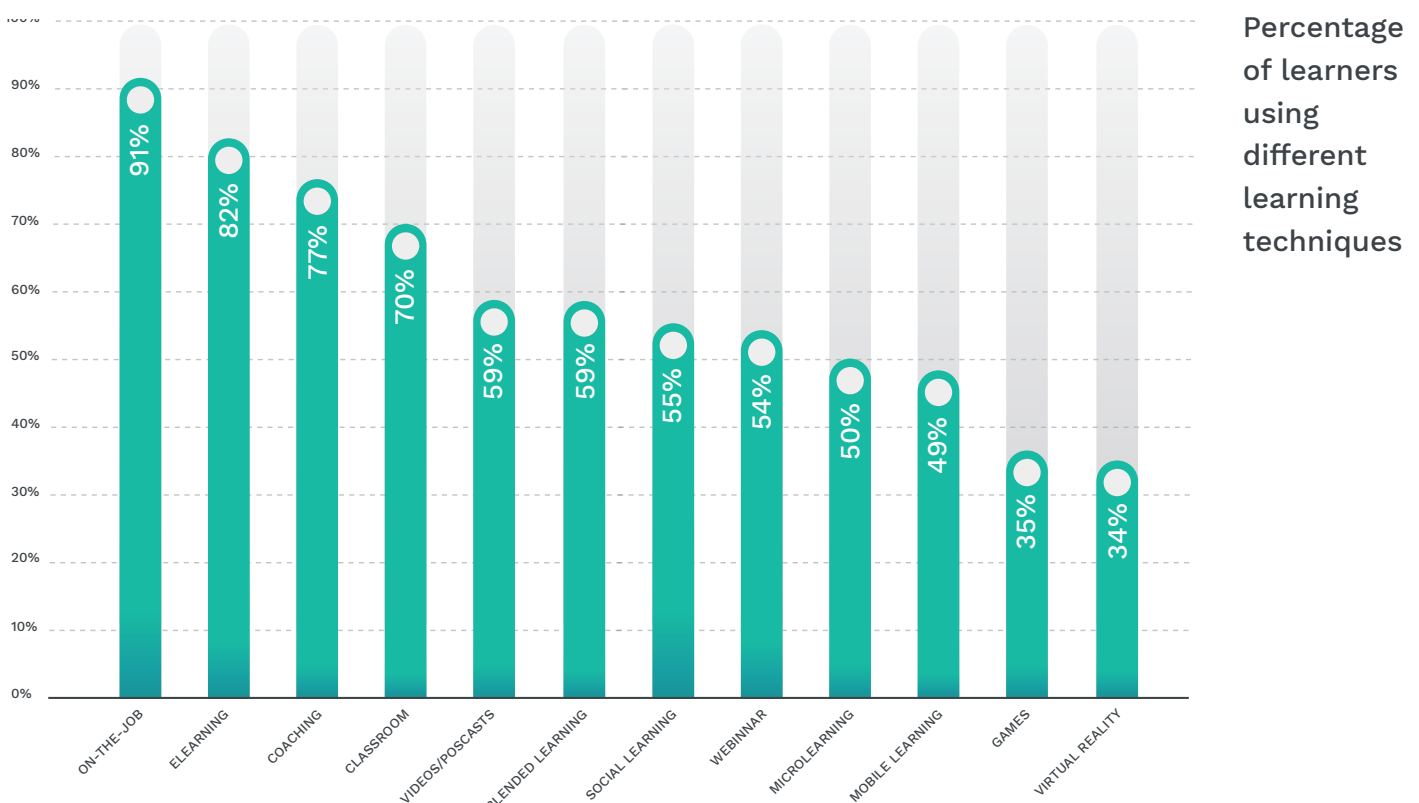
KEY: Under 250 250-999 1,000-4,999 5,000-10,000 10,001 PLUS

# Training techniques currently being used

L&D has a wide array of learning techniques available to support different learning styles and meet the needs of different training budgets, thanks to the rise in technology. How much is technology changing the way we learn? And how are different audiences in the workplace using technology to satisfy their learning needs?

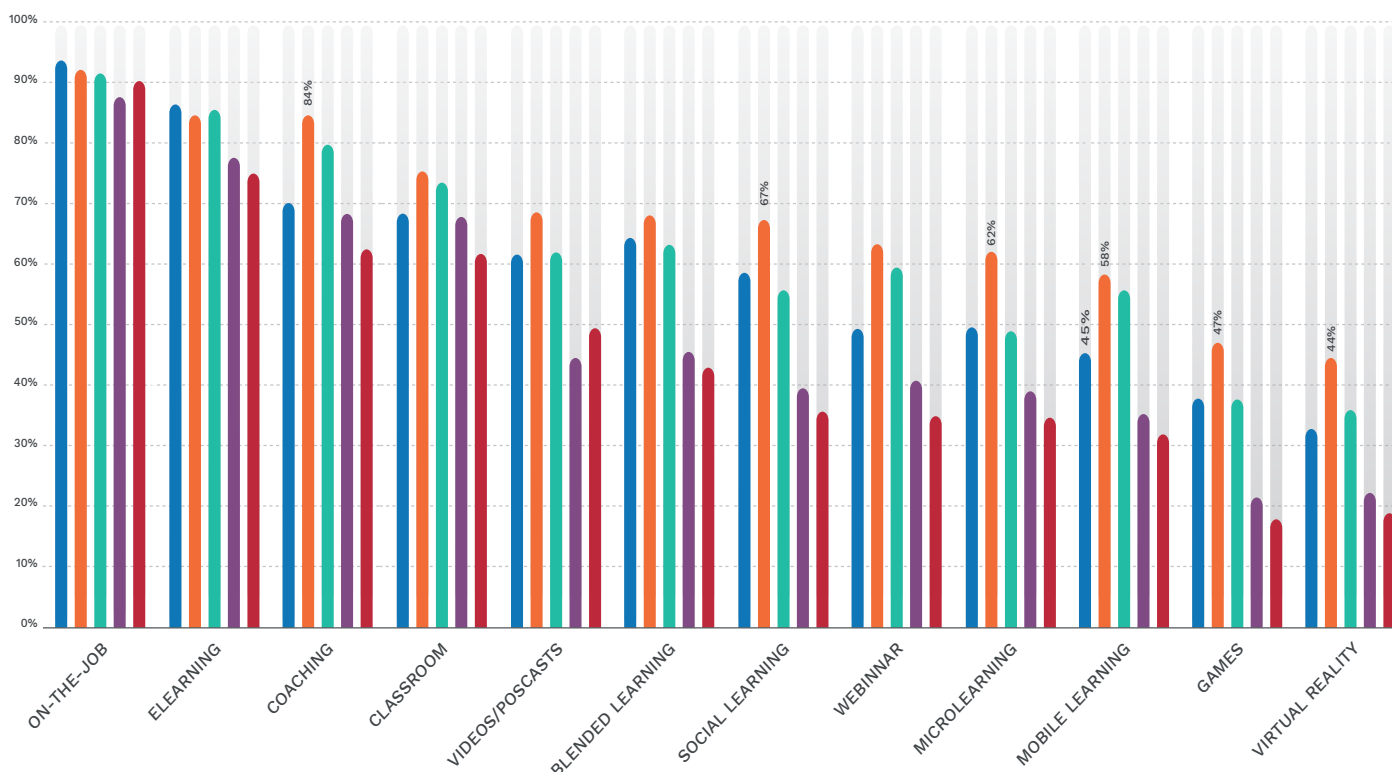
## Learning techniques used, overall sample

- On-the-job training is the most common learning technique (used by 91% of employees) followed by eLearning (82%), coaching (77%), and classroom (70%)
- The use of videos and podcasts has become mainstream with 59% of people using these techniques while mobile learning and microlearning are gathering pace, currently used by around half of all employees
- 1 in 3 employees are using emerging learning techniques including games and virtual reality



### Learning techniques used, by age

- Perhaps unsurprisingly, the older the employee, generally the less likely they are to be using learning technologies. There is a drop off in use, ranging between 10% and 20%, in the total proportion of those aged above 45 years (Gen X and Baby Boomers) for techniques including blended, social learning, mobile learning, games, and virtual reality
- Gen Y (aka Millennials), born during a time of fast-paced digital growth, are the most prolific users of technology-enabled learning as one would expect, with 67% using social learning, 62% using microlearning, 58% mobile learning, 47% games, and 44% using virtual reality. Interestingly, they are also the largest users of coaching (84%)
- Generation Z (Under 25s) are not such big users of learning technologies compared to Millennials. This is particularly evident in mobile learning where 45% of Under 25s are using mobile learning compared to 58% of 25-34 year olds
- The Under 25s are more likely to be using on-the-job and digital learning than anyone else, reflecting the fact that digital learning is an effective tool for onboarding new entrants into the workforce



Percentage of learners using different learning techniques: by age

KEY: Under 25 25-35 35-44 45-54 55 PLUS

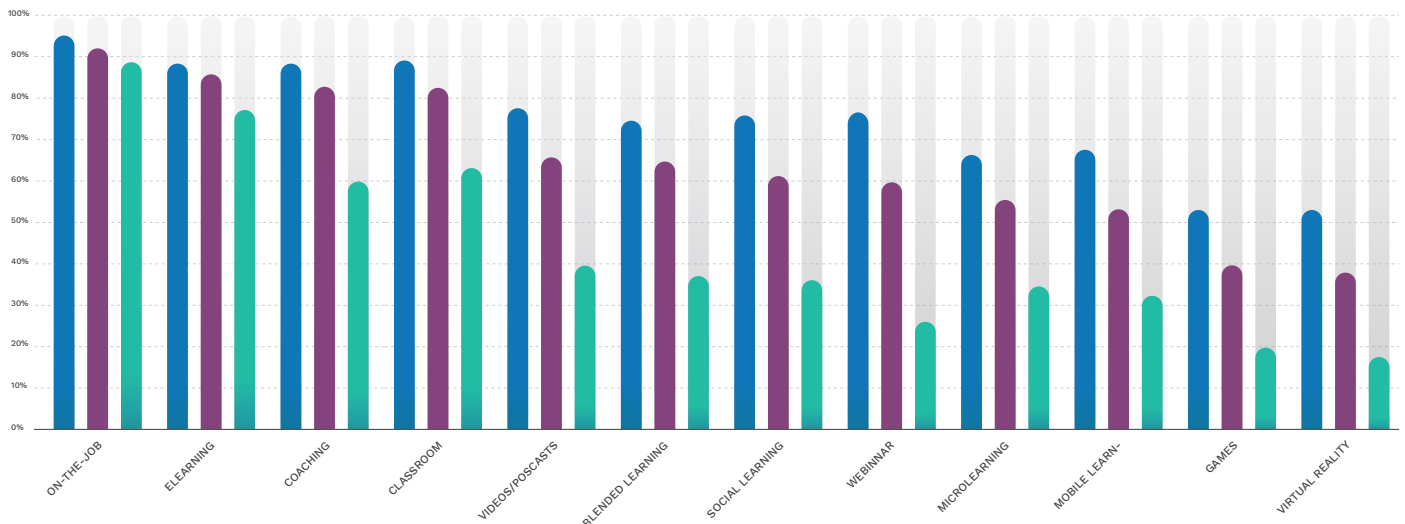


Gen Y (aka Millennials), born during a time of fast-paced digital growth, are the most prolific users of technology-enabled learning as one would expect

## Learning techniques used, by job role

- Business leaders and managers are using the largest variety of training techniques and are the biggest users of all learning technologies

- There is a particularly marked difference in the use of emerging technologies such as games and VR where business leaders are nearly 3 times more likely to use these than non-managerial employees and managers are more than 2 times likely to use these than non-managerial employees



Percentage of learners using different learning techniques: by role

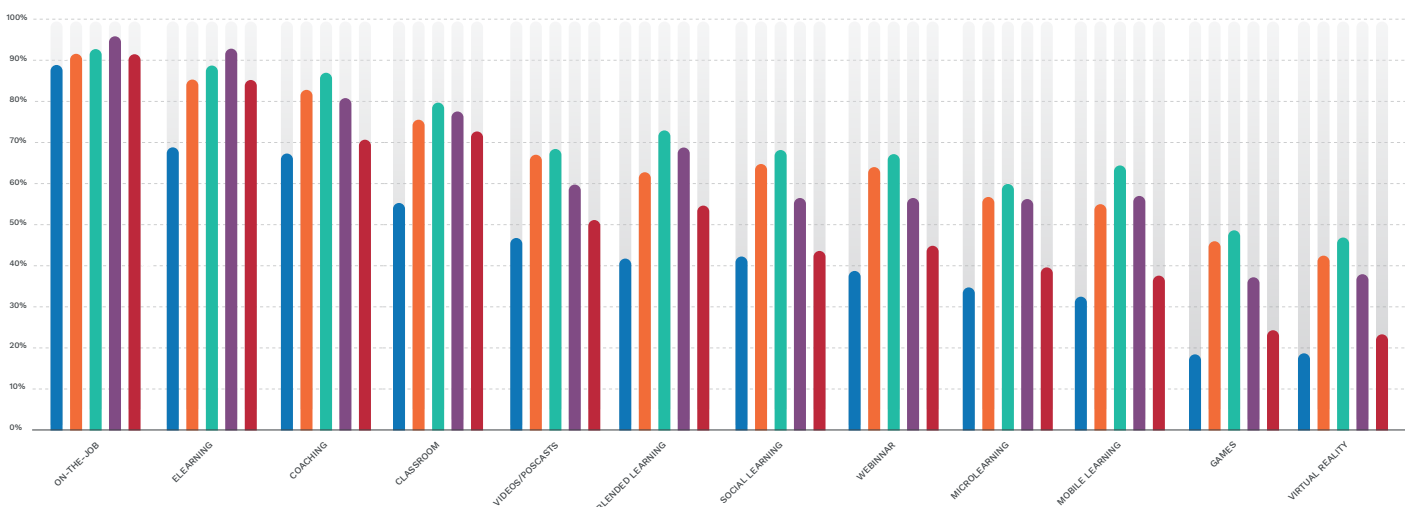
KEY: Business Leader Supervisor/Manager Non Managerial Position

## Learning techniques used, by organisation size

- SMEs (those with less than 250 employees) rely more on on-the-job training than other techniques and are using less learning technologies than larger organisations, perhaps reflecting that this size

organisation is less likely to have a well-developed and funded L&D function and systems

- Only 68% of people in SMEs are using eLearning compared to larger sized organisations where use varies from 84-92%



Percentage of learners using different learning techniques: by organisation size

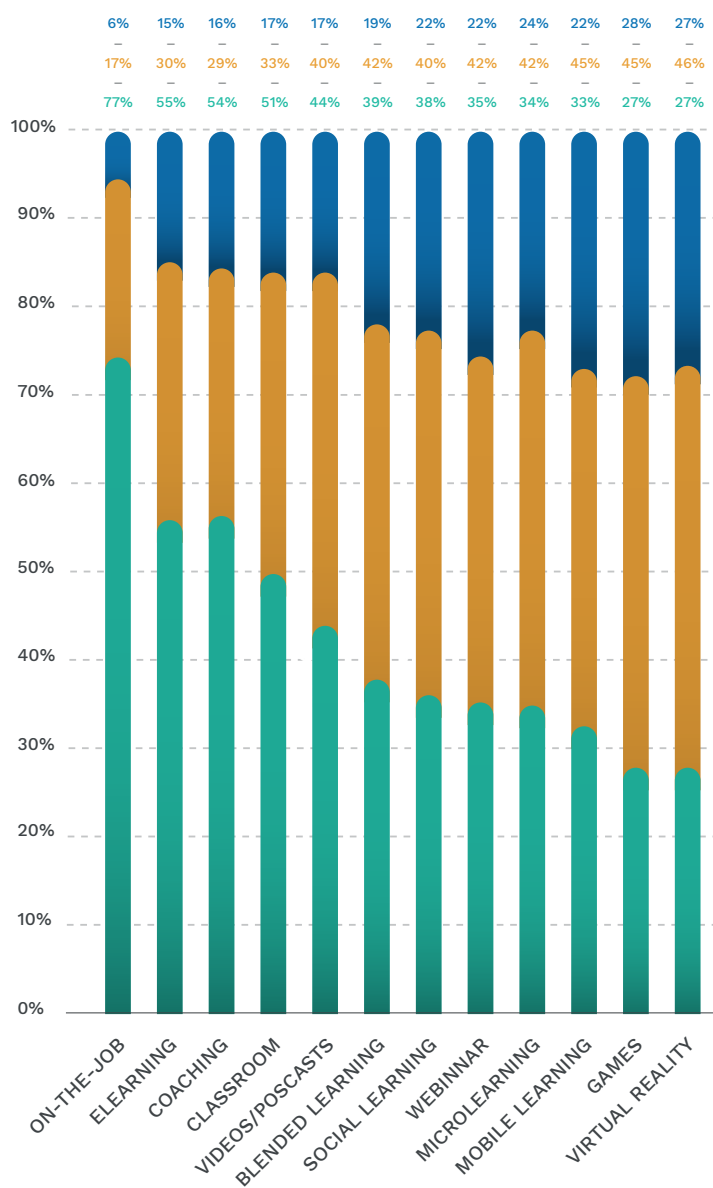
KEY: Under 250 250-999 1,000-4,999 5,000-10,000 10,001 PLUS

# Effectiveness of today's workplace learning techniques

With organisations increasingly offering a wider blend of learning techniques, we wanted to understand which methods learners perceive to be the most effective.

## Effectiveness of learning techniques, overall sample

- The resounding majority of learners (77%) find on-the-job training the most effective learning technique, followed by coaching (55%), classroom (54%), and eLearning (51%).
- Of all the learning technologies available, eLearning was found to be the most effective technique
- A large proportion of learners are undecided about how effective they find blended learning, videos/podcasts, social learning, mobile learning, webinars, microlearning, games, and VR. At least 40% of respondents indicated a neutral response to their effectiveness, which is perhaps a reflection of the lower levels of uptake of these technologies
- The survey shows that there is plenty of room to improve effectiveness across most techniques

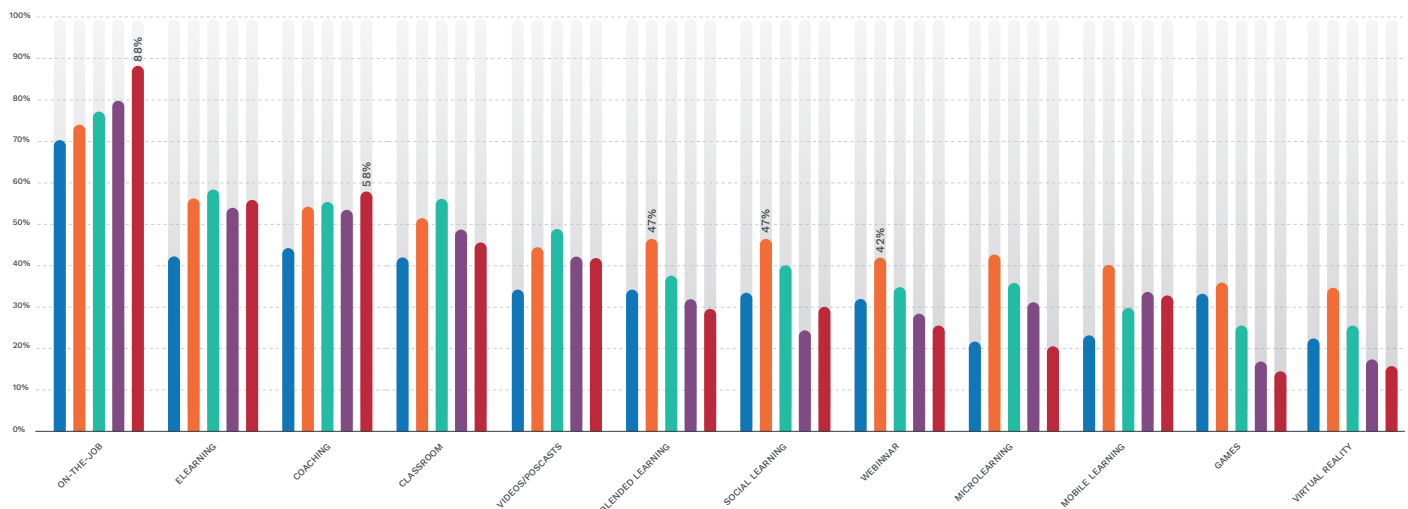


Effectiveness of workplace learning techniques

KEY: Effective Neutral Ineffective

## Effectiveness of learning techniques, by age:

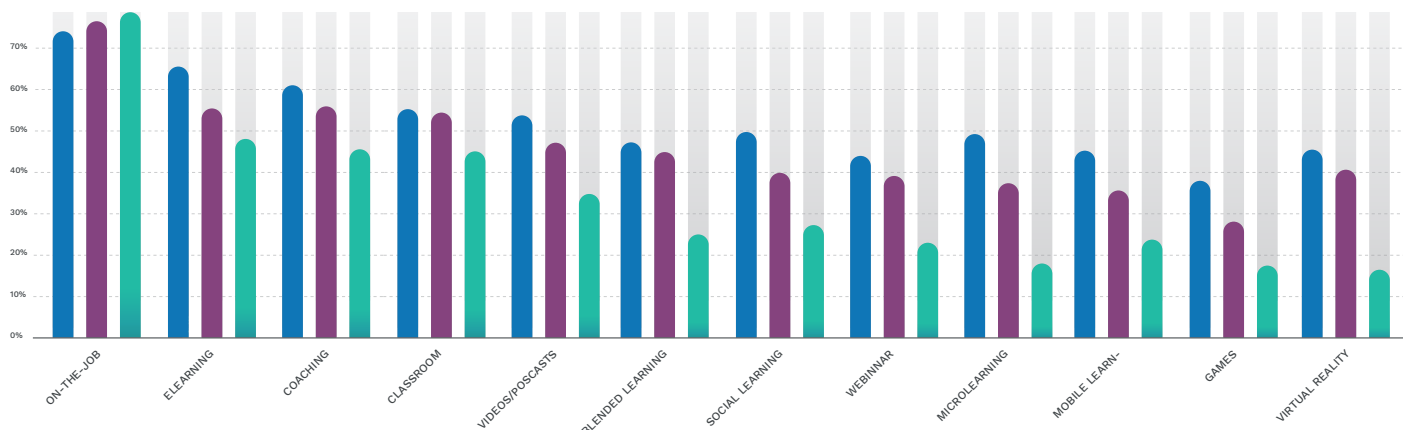
- On the whole, the older generations in the workplace find the more traditional learning techniques such as on-the-job and classroom training more effective than the younger generations
- Meanwhile, the tech-savvy Millennials find using learning technologies such as video, mobile learning, and social learning more effective than Gen X and Baby Boomers
- The most sceptical group of respondents were the under 25s who were less positive about the effectiveness of all the different training techniques available in the workplace



Effectiveness of workplace learning techniques: by age | KEY: Under 25 25-34 35-44 45-54 55 PLUS

## Effectiveness of learning techniques, by job role:

- The more senior an individual is within an organisation, the more likely they are to be positive about the effectiveness of the learning interventions they are using. This correlates with the fact that more senior employees spend more of their time learning.
- Their positive attitude makes them ideal champions of learning in the workplace, particularly for new recruits who may be more skeptical about a variety of techniques

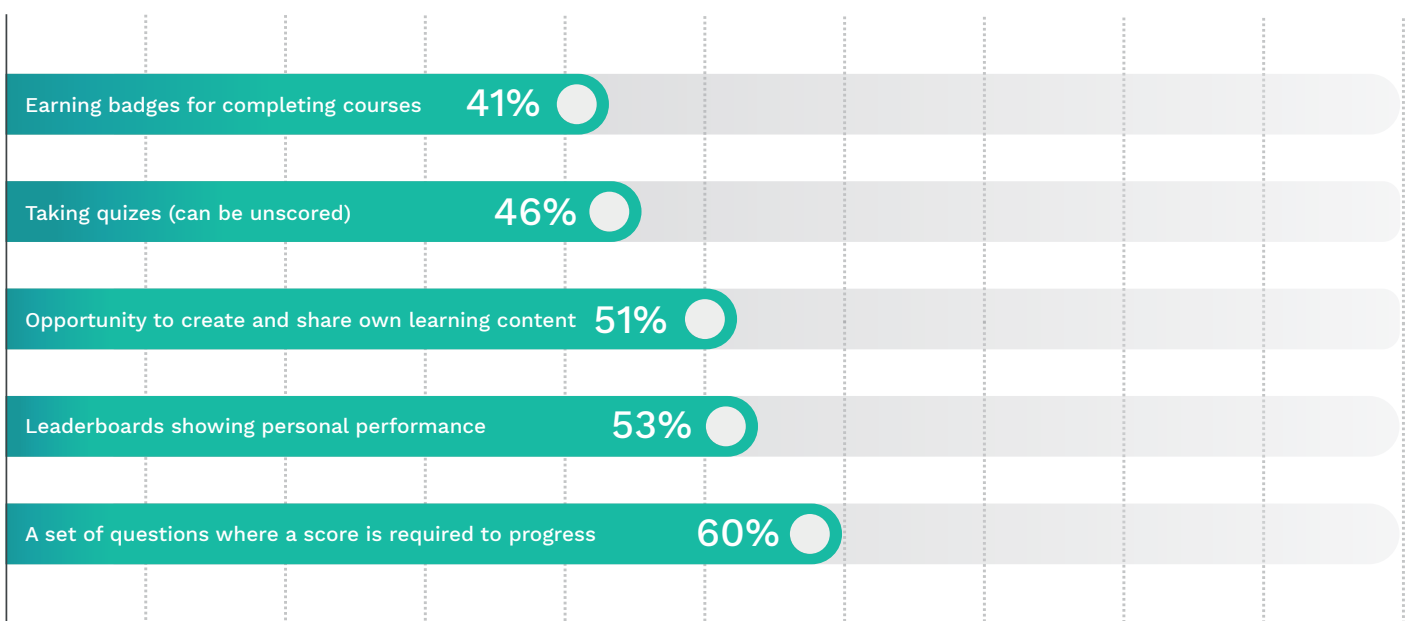


Effectiveness of workplace learning techniques: by age | KEY: Business Leader Supervisor/Manager Non Managerial Position

# Effectiveness of engagement techniques in online learning

Engagement is one of the most hotly debated topics in online learning. Badges and leader boards for example, have long been heralded in the industry as the silver bullet for keeping online learners engaged in their training. We wanted to find out the truth about gamification and other techniques used to motivate learners and shed some light on what actually for them.

- Online learners are most motivated by the need to pass a test to complete or progress through a course – 60% of learners are motivated by tests
- Learners find badges less motivating than any other gamification techniques – just 41% of learners are motivated by receiving a badge for completing a course
- Just over a half (53%) of learners are motivated by leader boards
- There is a lot of hype surrounding gamification and these results show that these techniques need to be well executed to be of value to the user



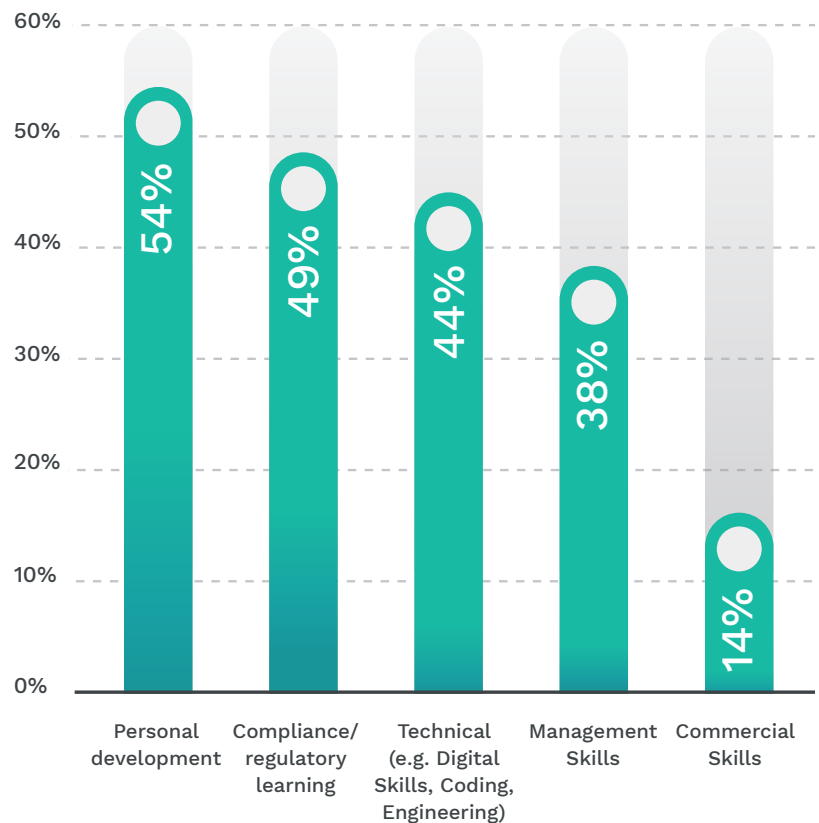


# Training topics covered by current learning techniques

Mandatory and compliance training courses have traditionally been the central tenet of L&D programmes and a primary focus of training resources.

With the rise of Millennials in the workplace who are thirsty to learn new skills and focus on their personal development, we wanted to understand whether this will have driven a corresponding rise in the uptake of personal development courses.

- In the last year, it was interesting to see that more people (54%) have undertaken personal development training than any other subject, demonstrating that today's learners are focused on self-development
- Compliance training is the second most common training topic (49%), followed by technical skills (44%), management skills (38%), and commercial skills (14%)



In the last year, it was interesting to see that more people (54%) have undertaken personal development training than any other subject



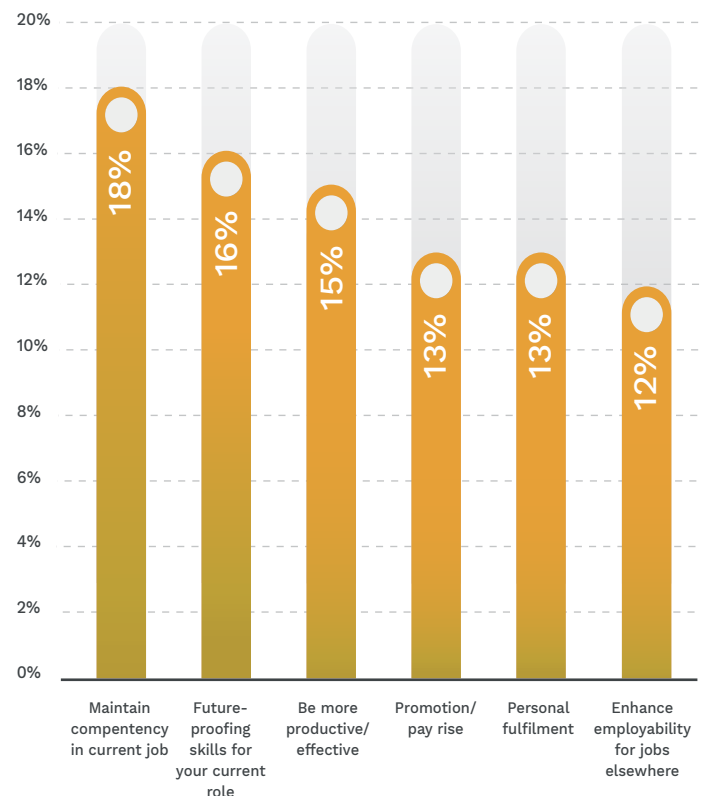
# Today's learning landscape: key motivators and alignment of learning plans

What motivates learners to develop their skills? How well supported are learners in creating a personal learning plan? And can they see how their learning plan aligns with organisational goals?

## What motivates learners?

Employees were asked to rank what motivates them the most to learn new skills.

- The number 1 motivator is competency with 18% of learners rating the need to 'maintain competency' in their current job as their primary driving factor
- In 2nd place is 'future-proofing skills for your current role' with 3rd place going to helping the learner to 'be more productive/effective'
- Surprisingly, personal fulfilment was not as a big a motivator for learning new skills as one might expect (only cited by 13% of learners as their primary driver)
- Learners are least motivated by getting a promotion or pay rise (13%) and enhancing their employability for jobs elsewhere (12%)

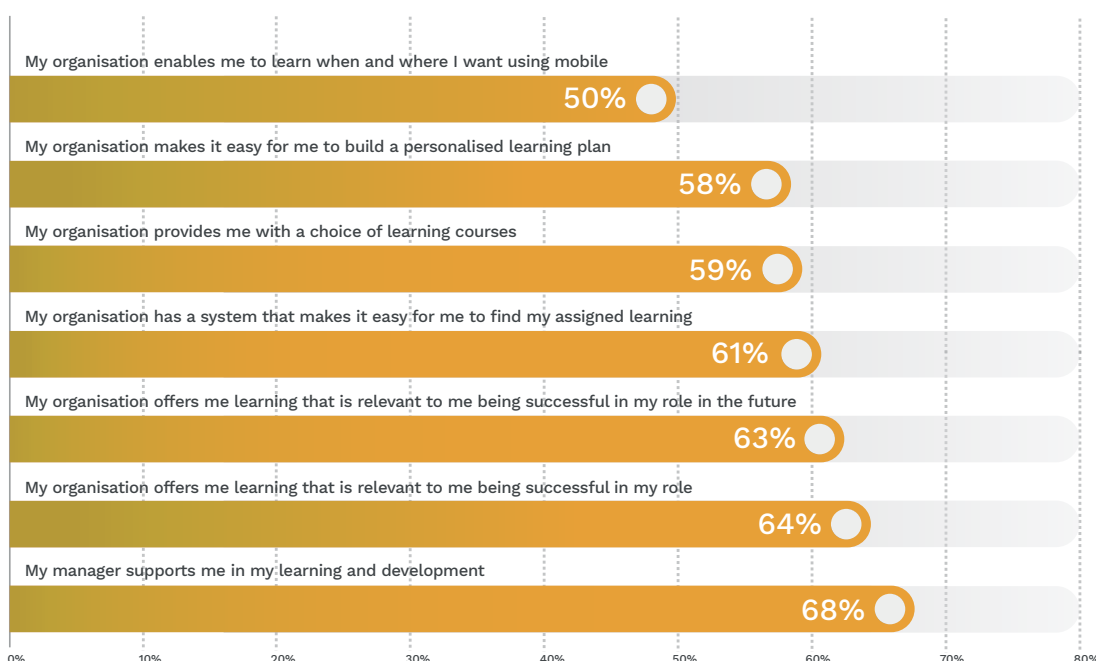


**Surprisingly personal fulfilment was not as a big a motivator for learning new skills as one might expect**

# Supporting a personalised learning plan

In the busy work place, learners who have the support of their managers and the tools they need to make learning part of their everyday working life are more likely to reach their full potential. In this section we look at how satisfied learners are with current practices and whether there are any barriers impacting the delivery of their learning plans.

- Learners are generally satisfied with the tools and support they are getting for workplace learning. They feel supported by their manager (68%) and feel they are being offered the right training to be successful in their current and future roles (64% and 63% respectively)
- Encouragingly, half of respondents reported that they are being given the opportunity to learn anywhere, anytime, on a mobile device
- With cumbersome learning management systems and paper-based processes being increasingly replaced with modern easy-to-use learning platforms, it's reassuring to see that 61% of learners surveyed have access to a system that makes it easy for them to find their assigned learning
- Also encouraging is the fact that more than half of learners agree that their employer is making it easy for them to build a personalised learning plan



68% feel supported by their manager

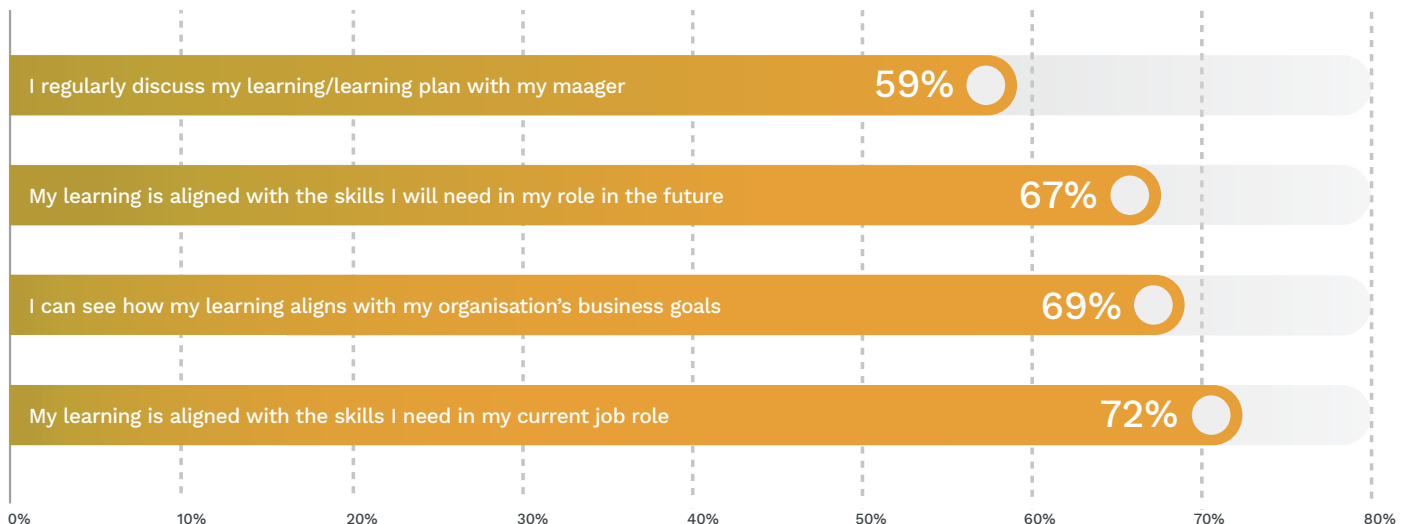


61% have access to a system that makes it easy for them to find their assigned learning

# Aligning L&D with personal and business goals

Given that learning and performance are heavily intertwined we wanted to establish how well aligned workplace learning is to personal and business goals. As digital disruption continues to change the business landscape and future skill requirements, are individuals and organisations making the investment required to future-proof their success?

- 72% of learners say that their learning is aligned with the skills they need in their current job role, and encouragingly, 67% believe their learning is aligned with the skills they will need in the future to be successful in their roles
- 59% of employees have regular discussions about learning with their manager
- 69% can see how their learning aligns with their organisation's business goals



59% of employees have regular discussions about learning with their manager

# Overall satisfaction with current learning practices

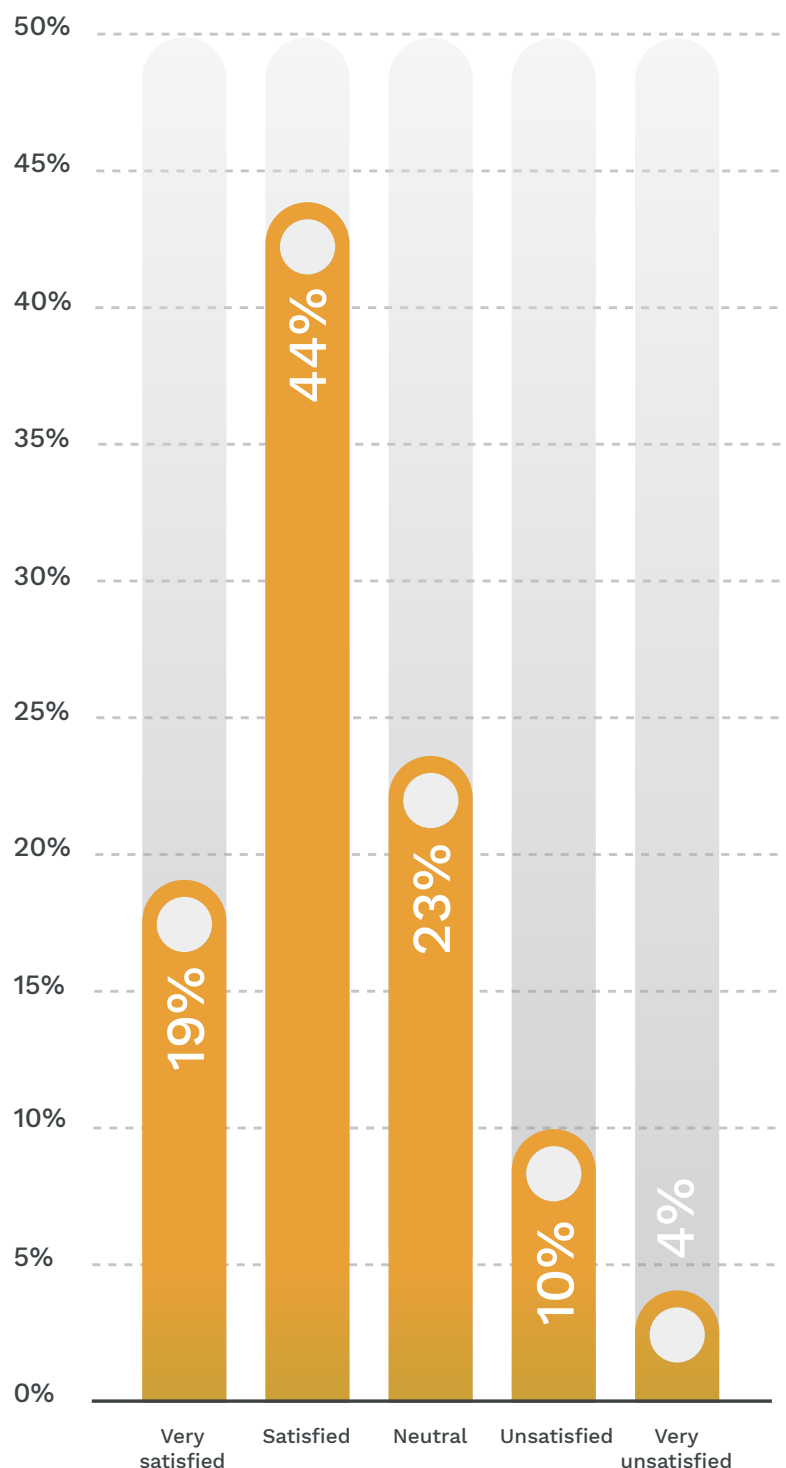
With the rise of different learning techniques in the workplace and learners being given more opportunity to learn when and where it suits them best, and on the devices of their choice, how satisfied are learners with current learning practices?

Nearly two thirds (63%) of learners are satisfied or very satisfied with their workplace learning. A quarter are neutral in their opinion, while 14% have expressed dissatisfaction, so there is clearly room for improvement in current learning practices.

While 63% satisfaction is promising, 37% of respondents still claim to be either neutral or dissatisfied with current practices. So what is it that learners want from workplace learning in the future?



Nearly two thirds (63%) of learners are satisfied or very satisfied with their workplace learning





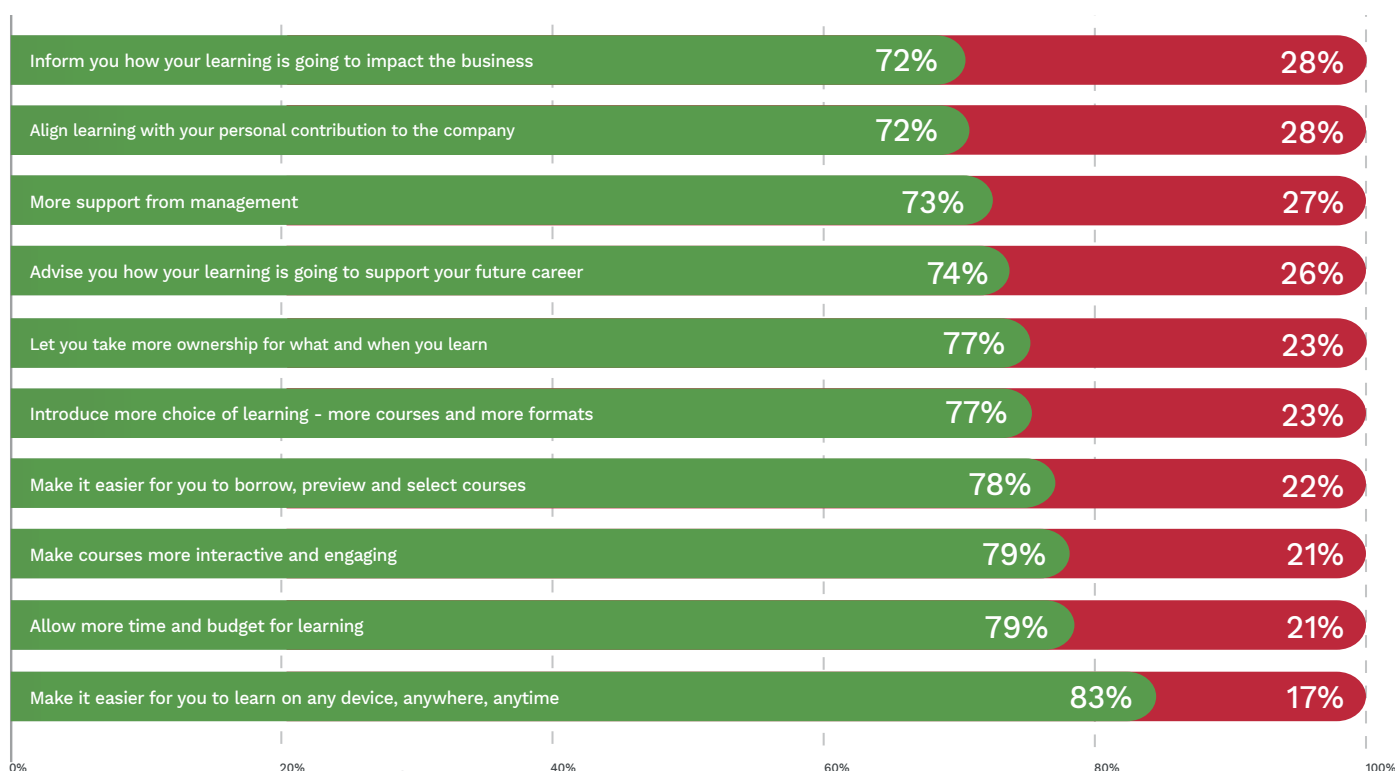
# Looking to the future

Our study provides insight into how learners perceive current workplace learning practices. But perhaps more importantly, it identifies areas where learners would like to see improvements made now and in the longer term future.

## L&D practices that learners would like to see improved

We asked learners how their organisation could improve workplace learning for them personally.

- The 3 areas most people would like to see addressed are: having greater access to mobile learning, bigger training budgets, and more engaging content
- 83% of learners would like their organisation to 'make it easier for them to learn on any device, anywhere, anytime'
- 79% of people would like their organisation to 'allow more time and budget for learning' and 79% would like 'more interactive and engaging courses'
- Although the majority of those surveyed would like improvement in all areas, the two least requested correlate with our earlier findings to show that the majority of learners (69%) understand how their learning aligns with organisational goals.

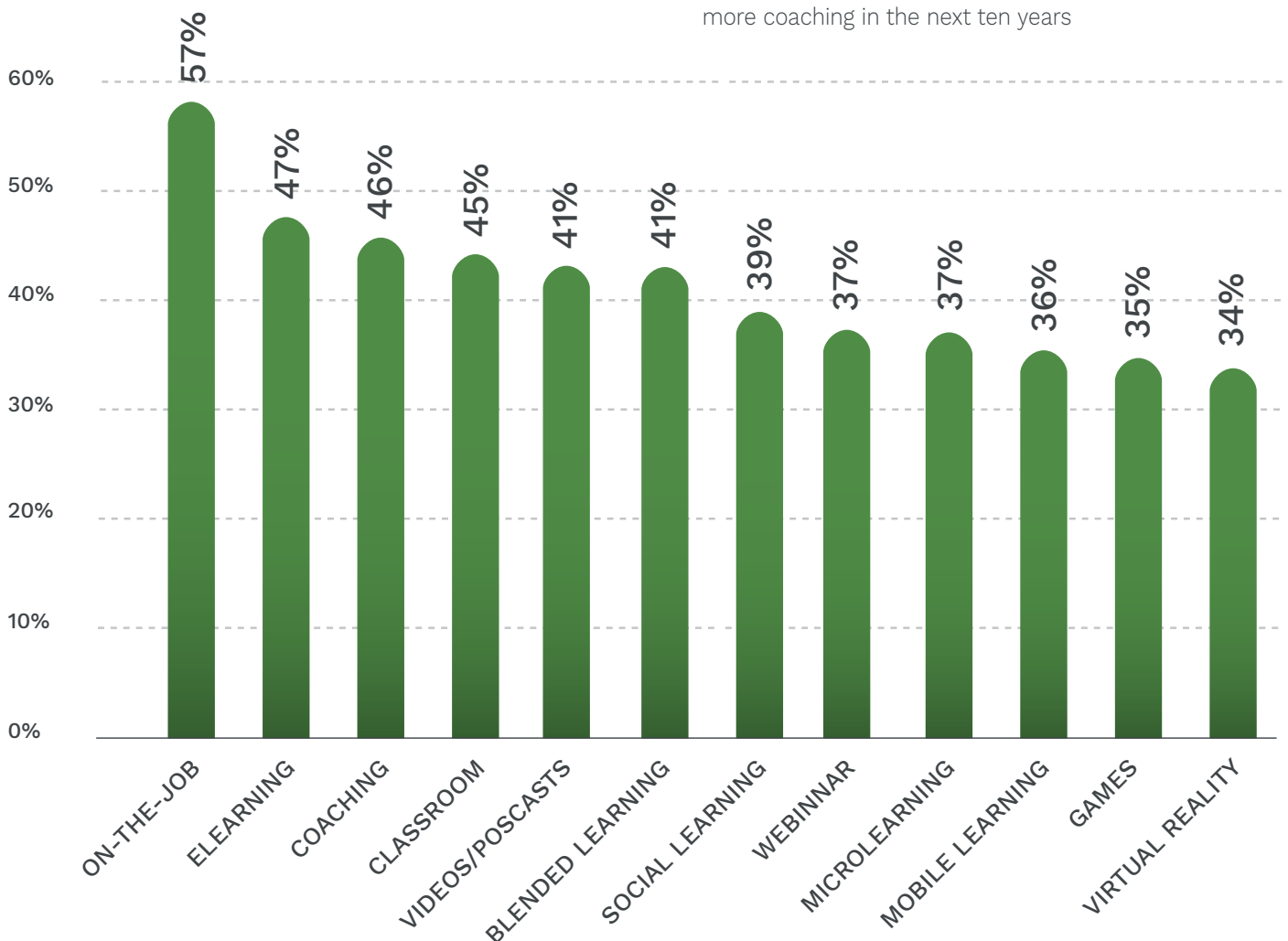


KEY: Needs improvement No improvement needed

# Workplace learning techniques people want more of in the next 10 years

Learners were asked which learning techniques they would like to see more, less, or the same amount of in the next decade.

- The three most popular learning methods that people would like to see more of are on-the-job learning (cited by 57% of learners); eLearning (47%) and mobile learning (46%)
- Could we see the death of the classroom as digital learning gains ground? Only 1 in 3 (35%) people want to see more classroom training over the next decade
- Coaching is also popular, with 45% of learners wanting more coaching in the next ten years

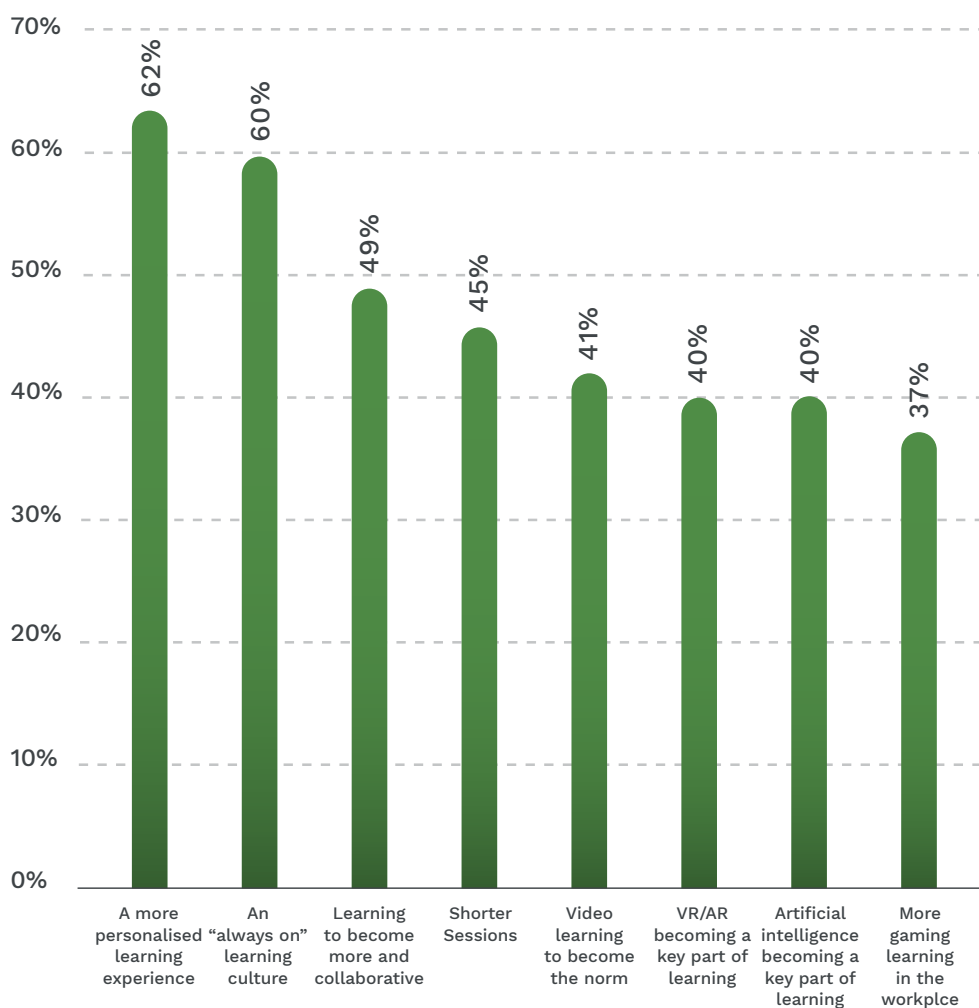


# How learners would like learning to evolve

We asked learners to think about workplace learning in the future and how they would like to see their learning experiences evolve

- The majority of workers (62%) want a more personalised learning experience and an ‘always on’ learning culture (60%)

- Almost half (49%) of the learner population surveyed would like learning to become more social and collaborative and 45% would like shorter sessions such as microlearning, reflecting the need to fit learning into the busy working day
- The use of AI, VR/AR, and gaming in the future are less important to learners than changes to learning culture



62% want a more personalised learning experience



49% would like learning to become more social and collaborative



AI, VR/AR, and gaming in the future are less important to learners than changes to learning culture



# Key takeaways for HR and L&D professionals

This report highlights that regardless of generation, job role, or company size, the majority recognise the long-term value of learning (with 78% agreeing that learning increases productivity). In the future, we can expect a shift towards enabling continuous learning as learning culture and personalisation becoming increasingly important.

In an age of people-first learning, learning in the workplace is all about people and culture. Technology is here to enable the delivery of what learners really want: a more personalised learning experience and an 'always on' learning culture.

Nearly two thirds of learners are satisfied or very satisfied with the workplace learning they receive. The majority would like to take more ownership over what and when they learn, have more variety in available courses, and more access to mobile learning. Learners are looking for a more connected and collaborative learning experience, personalised for their individual needs and preferences, that fits around their busy schedules. L&D has a pivotal role to play in supporting today's self-directed learner.

As the world of work continues to undergo seismic change due to rising technological, economic, political, and social disruption, learning must keep pace with the changing world of work. Human skills are a competitive advantage. Organisations that put their learners first, have the right learning technologies to

support continuous development, and nurture the skills required today and in the future, will be more successful at attracting, developing and retaining talent which will ultimately maximise their business performance.





# Contact us

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From personalised learning experiences to cultivating a continuous learning culture, get your organisation ready for the next decade in learning with Kallidus Learn and Kallidus Digital Content.

## Get in touch

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