

E-learning Is the Fastest-Growing

E-learning is the fastest-growing sub-sector of a \$2.3 trillion global education market, and the market for online higher education is estimated to exceed \$69 billion by 2015. This from a report by Research and Markets, a Dublin, Ireland-based company that serves the global marketplace.

One way to minimize marketing risks and to sell courses and programs overseas is to understand the environmental factors in taking your programs to market in any selected countries. In the new report, the political, economic, education, and technology environment in 42 countries on three continents — Asia, Europe and Latin America — is described. Critical assessments of each market help identify those markets that best align with an institution's internal goals and capacity to serve the market's demand.

Each country study includes demographic trends, economic situation and trends, technological capacity, education system, e-learning policy and presence, and analysis of opportunity. Also included are the number of students who study abroad and the number of foreign students who study locally.

While the report satisfies the first of several phases in a multi-step process, it can get an institution pointed in the right direction by helping to identify which countries present the best markets for expansion.

For a complete index of this report, visit the Website http://www.researchandmarkets.com/product/2377bd/global_elearning_opportunity_for_us_higher.



Latest Research Study of LMS Market Includes Talent, SaaS



The still-growing learning management systems (LMS) market is now at \$583 million and evolving to encompass talent management and SaaS technologies, according to a report from Bersin & Associates.

The 217-page report analyzes the LMS market from multiple perspectives such as market size and growth by segment. It also details the impact of performance and talent management and software-as-a-service (SaaS) trends.

"Over the last 10 years, LMS's have evolved into very sophisticated and complex enterprise applications. These systems are now morphing into strategic platforms for on-demand learning and talent management," says Josh Bersin, president of Bersin & Associates. "The market remains red hot. Most organizations now realize that an LMS will drive tremendous enterprise value."

Following are representative findings from the report:

>> The overall LMS market is now approximately \$583 million, a 21.5% increase in size since Bersin & Associates' 2006 LMS study. Growth is driven by the increasing importance of corporate training and talent management, the continued need for e-learning and other forms of electronic content, the critical support role of LMS applications, and the demand for systems that manage compliance and customer training.

>> The greatest growth (55.8%) continues to be in the mid-market segment (companies with 1,000 to 10,000 employees). Global enterprise and enterprise segments also grew, by 17.2% and 25.7%, respectively. Only the federal government segment's growth declined (30.8%).

>> The market still shows significant churn. Of companies planning to consolidate LMS's within the next two years, approximately 65% said they are "likely" or "somewhat likely" to switch LMS vendors.

>> Outsourced and on-demand (SaaS) solutions are in strong demand because of lower operational costs and faster implementations. Of companies that purchased LMS's in 2006, 61% chose either hosted or completely outsourced solutions.

>> The LMS 2006 study is based on more than 3,000 surveys and more than 200 customer interviews conducted in 2006 and 2007, as well as detailed briefings with all major LMS vendors.

For more information on Learning Management Systems 2008, go to www.bersin.com/lms. The study is available at no cost to Bersin & Associates research members. Non-members can purchase the study for \$1,495 or can purchase it along with the recently published 2007 LMS Customer Satisfaction for \$1,695. Source: McKinsey Quarterly

Touch Devices Are On Training Horizon

Although haptics aren't commonly found in training today, they soon may be, according to Brandon Hall Research.

Haptics involves transmitting information through the sense of touch or force feedback. Haptic devices and interfaces are generally used with 3-D virtual environments to give a sense of realism to the action taking place within the virtual world.

Haptic devices come in many forms, including pens, gloves, joysticks/joy pads and force-feedback mice. Technology has advanced to the point that the sense of touch and force can be experienced in real time over a network.

Touch is one of the most important sensations for growth and learning, especially when training motor skills and physical relationships. Haptic devices can also be used to provide feedback from hands-on models or simulators (such as flight simulators) and to try out procedures at a nanotechnology level, such as docking two molecules to see if they fit together.

Haptics may sound exotic, but they are being used today in many different learning applications. And, as more hardware and software vendors integrate haptics into their solutions, you may soon find applications for haptics within your organization.

For additional information about Brandon Hall Research products and services, please visit www.brandon-hall.com



Google 'Outsells' Yahoo! Search



Small and mid-size companies — but not large ones — rate Google's keyword search offering as superior to Yahoo!'s, according to the second annual Outsell, Inc. study looking at companies' ad budgets and strategies, broken out by business size.

Fifty-eight percent of small and mid-size companies rate Google ads effective, compared to only 32% rating Yahoo! effective. But large companies see no such difference, with 63% rating Google effective and a nearly identical 62% rating Yahoo! keyword search effective.

Outsell surveyed 1,010 advertisers who target the corporate, health care and consumer markets on a range of topics, from budgeting for print, broadcast and online media, to the effect of click fraud on spending decisions. These advertisers control \$6.5 billion in spending.

"Small, medium and large companies exhibit major differences in where they allocate their ad budgets and what strategies they find most effective," says Leigh Watson Healy, chief analyst for Outsell.

Among additional research findings:

>> Small companies devote almost twice as much of their budgets to print as medium-size companies. However, mid-size businesses rate the effectiveness of print trade magazines and events much higher than smaller companies do.

>> Small companies' share of online ad spending on search engines is more than double the share of medium or large companies.

>> Medium-sized companies forecast the highest growth rate of online spending, an opportunity for publishers.

>> Click fraud continues to deter some companies from pay-per-click advertising. Large companies estimate that nearly one-fifth of clicks on their ads are fraudulent, compared to small companies' estimate of 14.4 percent.

Companies that would like to purchase this report should go to <http://www.outsellinc.com/store/products/504>, phone (650) 342-6060 or e-mail info@outsellinc.com.

Compliance Still Plagues U.S. Small Businesses

Government regulation continues to plague small businesses despite federal efforts to reduce the time needed to meet the demands of compliance, according to a study by the Small Business Research Board (SBRB).

The SBRB report, co-sponsored by International Profit Associates (IPA), says 88% of small business owners and managers responding to the nationwide survey are finding it takes more time than it did two years ago to comply with government regulation.

Among seven leading industry segments, 93% of construction and contracting businesses indicate it is taking them longer to comply than two years ago.

The study coincided with the fifth anniversary of the signing of federal regulations designed to reduce the stress caused by government compliance requirements, the Small Business Paperwork Relief Act of 2002 (SBPRA).

"Various studies conducted between 2000 and 2004, including those by the task force as well as those completed by the U.S. Chamber of Commerce and the National Federation of Independent Businesses identified the source of the problem as well as its financial impact," says Gregg Steinberg, president of IPA. "The SBRB report clearly demonstrates that the vast majority of companies are putting more time into compliance, not less."

The latest information about the Small Business Research Board can be found at www.ipasbrb.com. More information about IPA can be found at www.ipa-iba.com. For more information about this poll, results of previous studies or other matters related to the SBRB, phone Raymond D. Minkus, (847) 441-4294.

Complying With Government Regs

Question: Do you take more time complying with government regulations today than you did two years ago?

Industry	% answering "yes"
Construction and contracting	93%
Transportation industry	92%
Automotive and retail	90%
Distribution/wholesaling	85%
Manufacturing	83%
Food/restaurant	80%

Source: Small Business Research Board



Coaching Rates No. 1

Coaching is the No. 1-ranked method of managing corporate talent, according to a new report from Bersin & Associates.

Bersin conducted more than two years of research that included more than 750 corporations and 1 million data elements to establish the report.

In the area of "performance management," formal coaching or well-established coaching programs for employees had a 48% impact on talent. The next five most important business initiatives, in order, were:

- 2 consolidating staffing requirements;
- 3 planning for current and future talent gaps;
- 4 competencies maintained through annual maintenance process; and
- 5 measuring time to hire, cost to hire and quality of hire.

The complete report is available at www.bersin.com.



Six Strategic Trends to Watch

- 1 Increasing emphasis on integrated access to teaching and learning resources
- 2 Content collections resulting in more usable, efficient and effective digital/print options
- 3 Self-directed learning programs with instructor in the loop for entry-level education or domain-specific learning
- 4 Evolving forms of collaborative learning
- 5 Capturing the classroom for transparent "authoring" techniques, rich media and mobile learning
- 6 Defining and implementing accountability and dashboard metrics

Source: IMS Global Learning Consortium:
<http://www.imsglobal.org/learningimpact2007/li2007report.cfm>