

# Getting to grips with e-learning

Assessing the size and value of the UK's e-learning sector is like trying to nail jelly. Learning Light has been getting out its hammer, reports **Bob Little**

**A**t the end of last year, Learning Light – the Sheffield-based centre of excellence in the use of e-learning and learning technologies in the workplace – did for the third time what most others have had neither the courage nor the hubris to do even once. Once again, it dared to provide an answer to the question: what is the size and value of the UK's e-learning sector?

Its answer is encapsulated in its third report in four years on the state of the e-learning sector in the UK. Included in this report for the first time was an analysis of e-learning in 19 other European countries too.

The origin of these reports is in one written on its behalf by John Helmer in 2007, which set out the size and value of the UK e-learning industry. Learning Light updated that report in 2009 by interviewing a number of vendors about the market and by further seeking to quantify its size. This series of semi-structured interviews was continued for the 2010 report.

The 2010 report, *The UK e-Learning Market 2010*, suggests that, in the next 12 months, the UK market will grow by no more than 4.76 per cent on the 2009 figure.

It reveals that the UK e-learning industry is currently turning over some £472m a year. Moreover, it says that last year's predicted market growth of up to 8 per cent was achieved despite the general economic downturn.

The 2010 report includes interviews with more than 40 UK e-learning companies, along with a number of other organisations and individuals across Europe. It concludes that the UK remains the largest, but not the fastest-growing, European market for e-learning.

It indicates that, while France and Germany will enjoy considerable growth (7.64 per cent on a market size of £375m and 7.75 per cent on £242m respectively), the e-learning markets in most Scandinavian countries will grow faster, albeit from a lower base. The fastest growing e-learning markets are in Eastern Europe – notably Slovakia – which will be driven by government- and EU-funded projects.

One of the report's co-authors, Gillian Broadhead said: "While few of our interviewees failed to see

the potential for growth in the corporate e-learning market, many also felt that the present economic downturn and the large reductions in government expenditure in the UK will dampen demand."

Learning Light operations director David Patterson added: "In terms of technology trends, we see considerable innovation and potential disruption to business models driven by open source technologies, mobile and smart devices, e-books, the cloud and software as a service.

"We retain our fundamental belief that this industry is evolving and will continue to do so, its appetite undiminished in its wish to exploit new technologies, devices and approaches to deliver effective learning."

"We do, however, remain perplexed," admitted Glynn Jung, head of Learning Leadership and co-author of the report. "Given the widespread acknowledgement that e-learning is now both effective and engaging, it's curious that we're not seeing a greater drive toward the adoption of e-learning by corporate leadership."

Learning Light acknowledges that it has always been difficult to estimate the overall size of the UK e-learning market – principally because companies such as Accenture and IBM don't separate e-learning from other revenues in their financial reporting and, in some cases, outsource elements of their e-learning to boutique providers, thus providing a risk of double-counting. Many UK e-learning companies are privately owned, registered in the UK but owned overseas, or their revenues fall below the Companies House threshold.

The 2010 report informed discussion at the European e-learning Summit, held in Sheffield last November. Delegates from around the world discussed the European and world markets for e-learning, identified industry trends and the key issues in e-learning today. You can read more in the December 2010 edition of *TJ*.

Not content to rest on its laurels and being happy to continue being controversial in pursuit of the truth about the corporate e-learning sector, Learning Light is embarking on research for its 2011 report on the industry. To add your views – and figures – to the research, email david.patterson@learninglight.com to schedule an interview.

You can find more about *The UK e-Learning Market 2010* at <http://www.e-learningcentre.co.uk/> **TJ**