

2010 Employer E-learning Benchmarking Survey

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Acknowledgment

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Summary

E-learning is now an integral component of training for Australian businesses. Employers are taking advantage of the flexibility of e-learning to provide timely and efficient access for employees to acquire and develop a wide range of skills and work related knowledge.

The Australian Flexible Learning Framework's (Framework¹) latest 2010 E-learning Benchmarking Survey² of 800 employers shows that the use of e-learning in workplace continues to increase.

- 50% of Australian organisations use e-learning as part of structured or unstructured training they provide to their employees (up from 40% in 2009).
- 42% of all employers' rated their knowledge of e-learning as 4 or 5 out of 5 (vs 37% in 2009), with an average score of 3.2 out of 5 (vs 3.0 in 2009). Ratings are even higher for employers who have had employees undertake VET through a registered training organisation (RTO) in the past 12 months.
- 60% of employers said that they expect their organisation's use of e-learning in provision of training to employees to increase in the next two years (vs 49% in 2009). Again, the response was higher among organisations which currently have employees undertaking accredited training.
- 85% of employers said that they would encourage their employees to use e-learning if it was available (vs 81% in 2009).
- Employers who are engaged with the training system are also now more aware of and more satisfied with the e-learning services being offered by training providers.

Employers' attitudes to e-learning are broadly consistent with findings from previous years, with a majority believing that e-learning increases people's access to training (88%), provides flexible training for employees (85%), and is an efficient way for people to undertake training (75%). Many employers gave practical examples of the benefits of e-learning to their organisation and employees.

"Most of our employees are in remote Queensland, so it's very difficult to get training organisations to go there. [With e-learning] a variety of different training can be undertaken and it's a lot cheaper."

"It's flexible. Rather than having employees sitting in one room, they can arrange their own time and do it when it's convenient. It's cost effective, more flexible, and they can review it over and over again."

"Because of the industry that I'm in [hospitality] it's impossible to attend training without e-learning. Most of my workers have a second job during the day, so this is convenient and I can help them. Being able to sit down at a computer is very important to us."

The 2010 employer survey asked employers for the first time about their attitudes to the Australian training system. Around two-thirds of employers believe that the training system provides flexible training for employees, that it is responsive to employer demand for skills, and is meeting their industry's and their organisation's skill needs. Feedback from the health care and education sectors was more positive than that from manufacturers.

¹ The Australian Flexible Learning Framework is collaboratively funded by the Australian Government and all states and territories and provides the VET system with the essential e-learning infrastructure and expertise needed to respond to the challenges of a modern economy and the training needs of Australian businesses and workers: <http://www.flexiblelearning.net.au>

² The 2010 Employer E-learning Benchmarking Survey is conducted by the Framework's Benchmarking and Research business activity: <http://www.flexiblelearning.net.au/research>

The 2010 survey also found that employers are satisfied that their employees' current skill levels meet existing skill requirements. Training demand is driven by the need to develop and acquire skills for future operations and business growth. The challenge for the VET system is to respond to this emerging demand pressure and to continue to flexibly support skills development in the Australian workforce.

This report summarises the results of the Framework's 2010 E-learning Benchmarking Survey of employers.

It will be followed later in 2010 by more detailed analysis of the survey results, including comparisons of employers' responses to all questions by state and territory, by industry sector and by employer size. This analysis will be published on the Framework's E-learning Indicators website: <http://flexiblelearning.net.au/e-learningindicators>

E-learning Benchmarking surveys

The 2008-2011 Framework Strategy

The *2008–2011 Framework Strategy*³ is working toward making e-learning an integral part of the national training system. In this way, the Framework is contributing to a VET system that is best equipped to respond to the challenges of a modern economy and the training needs of Australian businesses and workers.

The *2008–2011 Framework Strategy* outlines a vision for a future in which:

- *'learning is tailored to learners'* – not restricted by place and time, personalised to suit individual learning needs and an engaging collaborative and 'networked' experience
- *'learners are more in control'* – able to choose their training provider using pathways to advantage and acquiring ICT learning skills with mechanisms for recognising and recording the skills they acquire in ways that make sense to employers
- *'teachers are effective 'managers of learning''* – skilled at using ICT to enhance the learning experience, freely accessing up-to-date quality learning resources, facilitating and managing learning and more engaged with their clients
- *'businesses invest in workforce development'* – and recognise that flexible learning can fit around other business priorities
- *'there is a sustainable e-learning infrastructure'* – through a pool of national resources, a system of national technical standards, and evolving and innovative approaches to the use of new technologies.

E-learning Benchmarking surveys

The Framework monitors the uptake, use and impact of e-learning in the VET system through periodic surveys of VET students, VET teachers and trainers and RTOs. The Framework's Benchmarking and Research business activity also surveys Australian businesses to gauge their experience of and attitudes to e-learning.

These surveys are based on a set of indicators, originally developed by the Flexible Learning Advisory Group (FLAG⁴) in 2004 to measure the uptake and use of e-learning and e-business in the national VET system, and the impact of e-learning on VET clients and VET providers. These indicators were refined and supplemented in 2008 to incorporate additional indicators included in the *2008-2011 Framework Strategy*. The full list of indicators and results of previous years' surveys can be viewed at the Framework's E-learning Indicators website: <http://flexiblelearning.net.au/e-learningindicators>

The E-learning Benchmarking Survey of employers was first conducted in 2005, and repeated in 2007 and 2009. The fourth E-learning Benchmarking Survey of employers was conducted in May/June 2010.

Copies of the employer surveys and the results of the 2005, 2007, 2009 and 2010 surveys can be accessed at the Framework's E-learning Indicators website. The definitions of e-learning and e-business adopted in all E-learning Benchmarking Surveys are provided in Appendix 1.

³ The *2008-2011 Framework Strategy*:

http://www.flexiblelearning.net.au/flx/webdav/site/flxsite/shared/Secretariat/2008_2011_Framework_Strategy.pdf

⁴ FLAG is the Framework's managing body. It is an advisory group of the National Senior Officials Committee (NSOC) and provides advice on strategic direction in flexible delivery, with particular reference to e-learning. FLAG is also responsible for providing advice on VET sector perspectives to the Australian Information and Communication Technology in Education Committee (AICTEC). It comprises a senior nominee of the Department of Education, Employment and Workplace Relations (DEEWR), each state and territory VET CEO and one representative of the national Adult and Community Education (ACE) sector: <http://www.flag.edu.au>

Survey methodology

2005 and 2007 employer surveys

The original survey of employers' attitudes to and experiences of e-learning in VET was conducted in 2005. The computer-assisted telephone survey was conducted on behalf of the Framework by I & J Management Services, using the market research capabilities of Chant Link & Associates. It captured information from 400 employers who had employees undertaking VET through a RTO. The survey randomly contacted employers by telephone based on information available through telephone and business directories. Screening questions were used to select only employers with employees who had undertaken accredited training in the preceding 12 months. Quotas were set to capture information from businesses in line with the state and territory distribution of the Australian population, with minimum quotas set in Tasmania, the Northern Territory and the Australian Capital Territory to allow for publication of results in all states and territories.

There was no employer survey in 2006, with the assumption that employers views were not likely to change significantly in the space of 12 months.

The survey of employers was repeated in 2007. There were some refinements to the survey questions to capture additional quantitative and qualitative information on employers' attitudes toward flexibility in training and the value of ICT skills in the workplace.

There was no employer survey conducted in 2008.

2009 and 2010 employer surveys

To reflect the changed emphasis of the *2008-2011 Framework Strategy*, the 2009 and 2010 employer surveys were restructured to capture information on training approaches and attitudes to e-learning from all employers, not just those who are formally engaged with the VET system through a RTO.

The 2009 employer survey included additional questions related to the provision of structured and unstructured training by employers and their own use of e-learning. It doubled the sample of employers, to include 400 who had employees undertaking VET through RTOs, and 400 who did not have employees undertaking training with a RTO.

The 2010 employer survey adopted the same sampling methodology as in 2009. It included additional questions on the performance of the Australian training system in meeting industries' skills needs and employers' access to e-learning resources, and removed questions related to awareness, access and use of e-business services provided by RTOs.

The 2010 survey had seven key elements (as shown in the following table).

Screening questions	<ol style="list-style-type: none"> 1. Identification of a person responsible for employee VET (including in-house training and accredited training delivered through a TAFE or other RTO). 2. Agreement to participate in an 8 to 12 minute telephone survey. 3. Determination of whether the business had recently had an employee undertaking VET through an RTO as part of their employment.
Part A	Questions related to the types of structured and unstructured training used by the organisation and its employees' skill levels (Q1 to Q3).
Part B	Questions related to the use of e-learning and e-learning training resources in provision of structured and unstructured training by employers (Q4 to Q9).
Part C	Questions related to attitudes to the Australian training system and acquisition of skills (Q10).
Part D	Questions related to attitudes to e-learning (Q11 to Q12).
Part E	Questions related to knowledge of and satisfaction with e-learning provided by their RTO (Q13 to Q17).
Part F	Questions related to the size, location and industry of the organisation (Q18 to Q22).

The third screening question was used to filter questions each respondent received. Where a business had recently had an employee undertaking accredited training through a RTO the respondent was asked all questions in Parts A to F. Where the business had not recently had an employee undertake accredited training the respondent was only asked the questions in Parts A to D and Part F (ie not Part E). A full copy of the 2010 survey questions is provided in Appendix 2.

By using this approach the survey was able to capture standard information from all businesses that agreed to participate in the survey. Additional information on e-learning provided by RTOs was then captured (in Part E) from those businesses that had recent experience with the VET system.

Sample sizes were set at a total of 800 respondents, of which 400 had recent experience with the VET system. This compared with the samples in the early years of the survey which only went to 400 businesses with recent experience with the VET system.

State/Territory	Sample size						
	2005 (VET)	2007 (VET)	2009* (VET)	2009* (full)	2010 (VET)	2010 (full)	2010 (full)
NSW	109	107	158	282	113	210	26%
VIC	80	74	101	189	75	150	19%
QLD	60	60	70	147	60	120	15%
WA	40	39	29	74	38	80	10%
SA	27	31	25	67	29	60	7.5%
TAS	28	30	9 (23)	20 (50)	32	60	7.5%
NT	29	30	2 (25)	7 (50)	26	60	7.5%
ACT	27	29	6 (25)	15 (50)	27	60	7.5%
Total	400	400	400	801	400	800	800

* In 2009, the interviewers initially surveyed employers to fill sampling quotas based on the proportion of the Australian population in each state and territory. Additional sampling beyond the 800 threshold was undertaken to ensure that were sufficient results for analysis and publication of both 'VET' and 'full' results for every state and territory, including TAS, NT and ACT. These additional responses were not included in the 'national' results shown in the 2009 Employer E-learning Benchmarking Survey report.

2010 response profile

The businesses surveyed in 2010 were spread across all states and territories, and were of different size and from different industries. Of the 800 full respondents, 30% had less than 20 employees, 25% had between 20 and 99 employees, 33% had between 100 and 499 employees, with the remaining 12% having more than 500 employees.

The survey also had good coverage across different industry sectors with more than 50 responses received from businesses in the following industry sectors:

- Manufacturing (122)
- Health care and social assistance (113)
- Retail trade (103)
- Education and training (79)
- Accommodation and food services (69)
- Professional, scientific and technical services (63)
- Construction (61)

and more than 20 responses received from the following industry sectors:

- Other services (26)
- Information, media and telecommunications (23)
- Wholesale trade (22)
- Arts and recreation services (22).
- Transport, postal and warehousing (21).

A profile of the survey respondents is provided in Appendix 3.

Analysis and report

This report presents analysis of the results of the 2010 employer E-learning Benchmarking Survey against the relevant e-learning indicators.

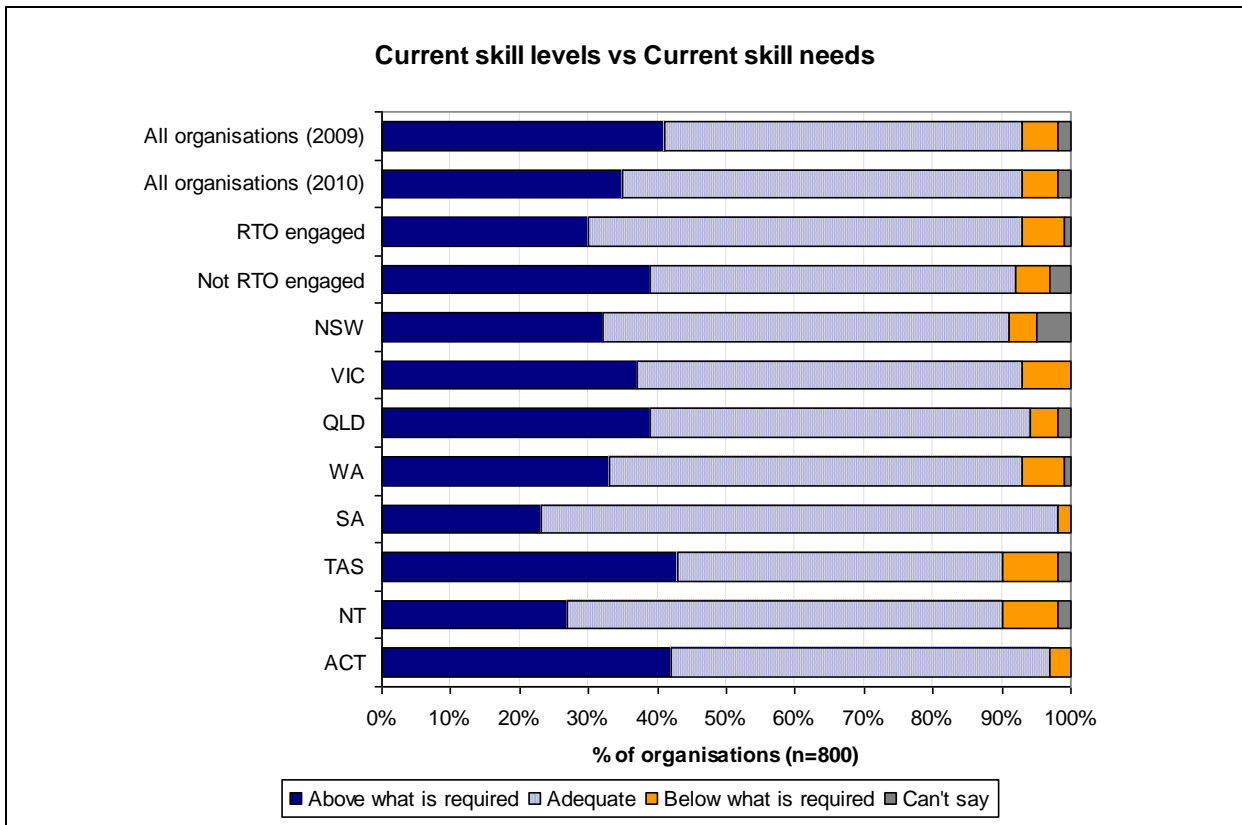
All results must be interpreted in light of the statistical variations that exist in any survey process of this type. The nature of most of the questions in the survey means that with a total sample size of 800 employers, and state/territory cohorts within the total sample, a difference of approximately +/- 3% between years on an overall result is not statistically significant.

More advanced analysis of the responses, including analysis against demographic factors such as industry type and employer size will be undertaken as part of the Framework's Benchmarking and Research business activity.

Demand for skills in Australian organisations

The overwhelming majority of Australian organisations participating in the Framework’s 2010 E-learning Benchmarking Survey reported that the current skill levels of their employees are adequate to meet their needs. Thirty-five percent of organisations reported that current skill levels were above current requirements, with 58% reporting current skill levels as adequate. Only 5% said that their employees’ current skills were below that required by the organisation.

The overall proportion of organisations reporting current skill levels as at or above requirements in 2010 (93%) was the same as in 2009, although there was a drop in the proportion of employers who reported an ‘above requirements’ rating⁵.



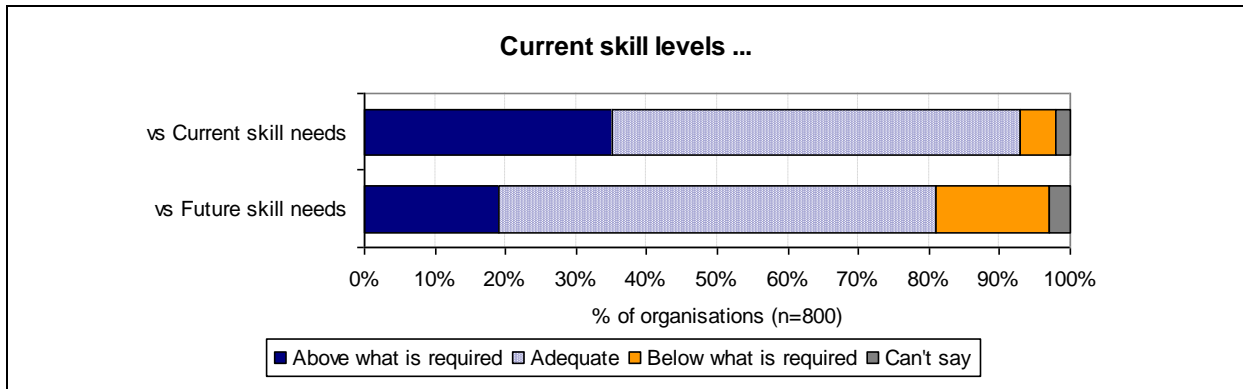
Across all states and territories, and among employers that currently had employees undertaking accredited training with a RTO and those that did not, at least 90% of employers reported that employees’ current skill levels were at or above the organisation’s current skill needs.

This finding indicates that demand for skills improvement is, for most employers, not about supporting their current operations. Whilst there is always value in improving employees’ skills, these are currently adequate to meet business requirements (although there may also be unmet demand for new skilled employees). The demand for skills is needed for future operations and business growth.

Only 81% of employers said that their employees’ current skills were adequate to meet their organisation’s future skill needs. Sixteen percent said current skill levels were below the level needed to support future operations. The future skills gap was highest in WA (24%) and lowest in VIC and the ACT (12%). The proportion of employers saying current skill levels

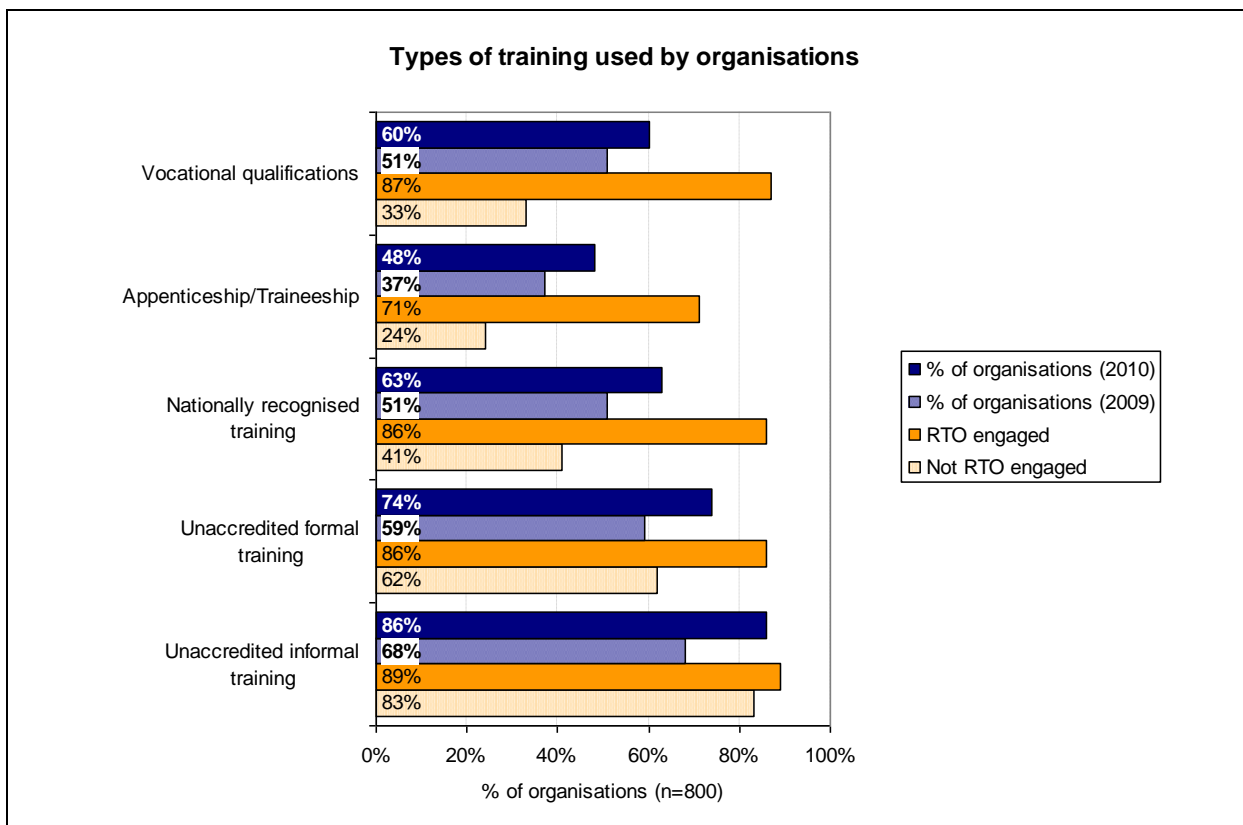
⁵ Changes from year to year may be due to real changes in practice or attitudes, and/or changes in the profile of employers participating in the surveys. For example, the 2010 employer survey had a lower proportion of small employers (less than 10 employees) and higher proportions of medium to large employers.

were below future skill requirements was high in the manufacturing sector (20%) and low among employers in accommodation and food services (7%), professional, scientific and technical services (10%) and retail trade (11%).



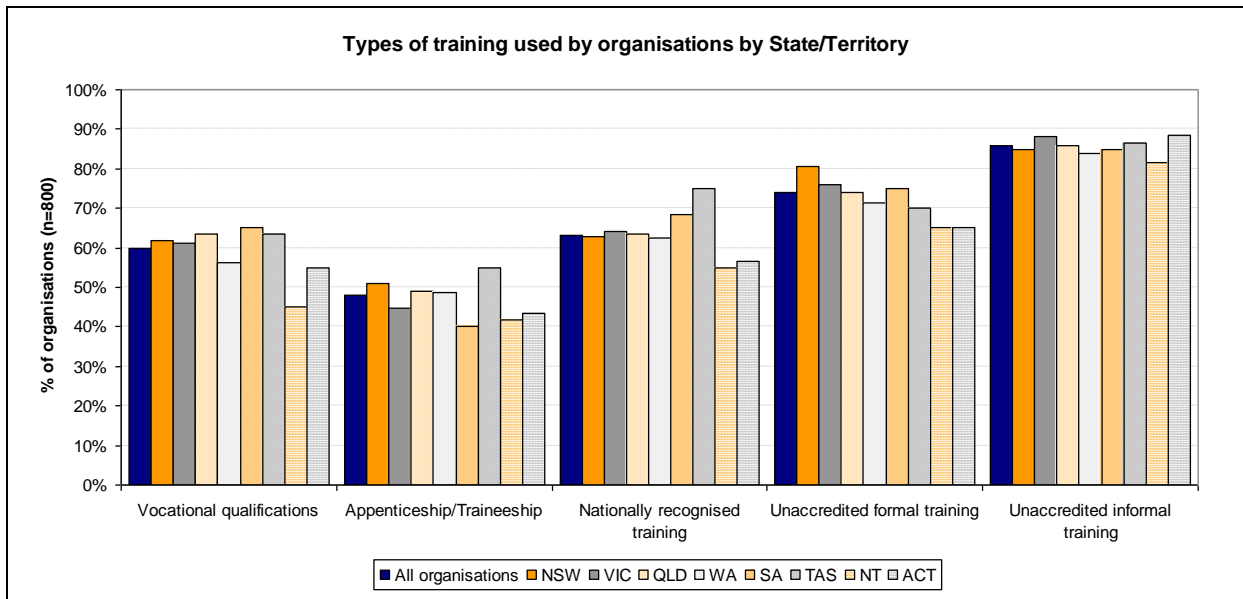
Vocational training

A significantly higher proportion of employers participating in the 2010 E-learning Benchmarking Survey indicated that they used structured and unstructured vocational training than was reported in 2009. Around 10% more employers reported using vocational qualifications, apprenticeships/traineeships and nationally recognised training as a mode of training for employees, with around 15% more employers than in 2009 using unaccredited training options.



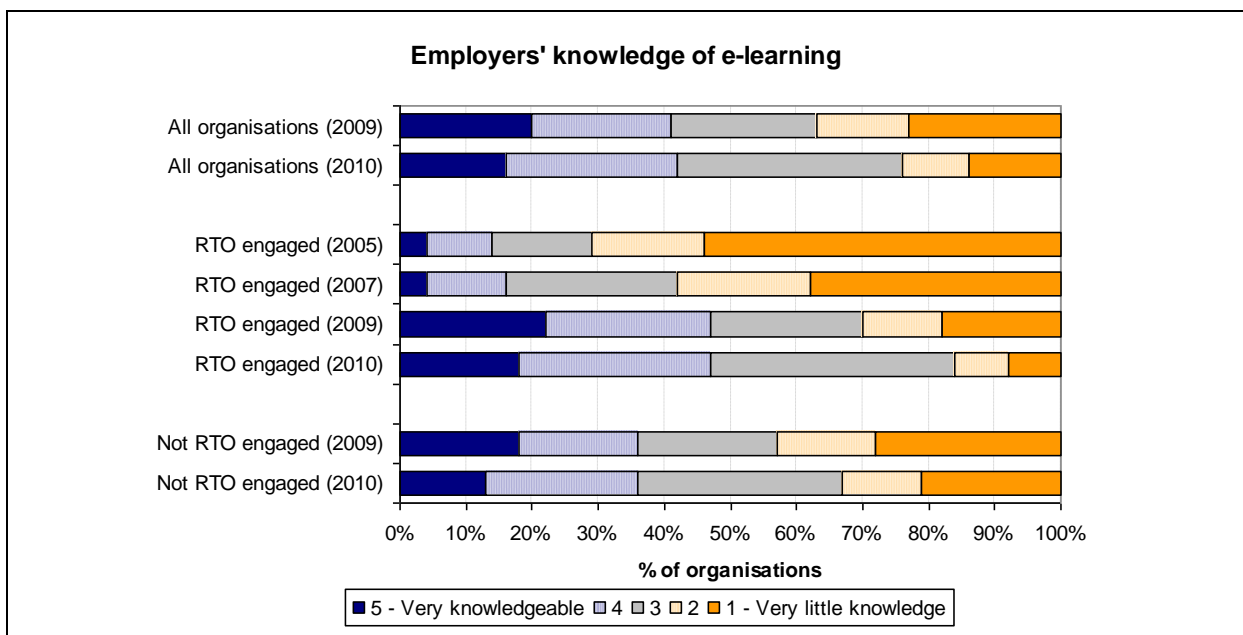
The use of various vocational training options, both external and internally managed, was much higher among those employers that had a recent relationship with a RTO than those employers who had not had employees undertake training through a RTO in the past 12 months. The gap in training profile between employers who were 'RTO engaged' and those who were not was lowest for unaccredited informal training, which is used by 80% to 90% of all employers.

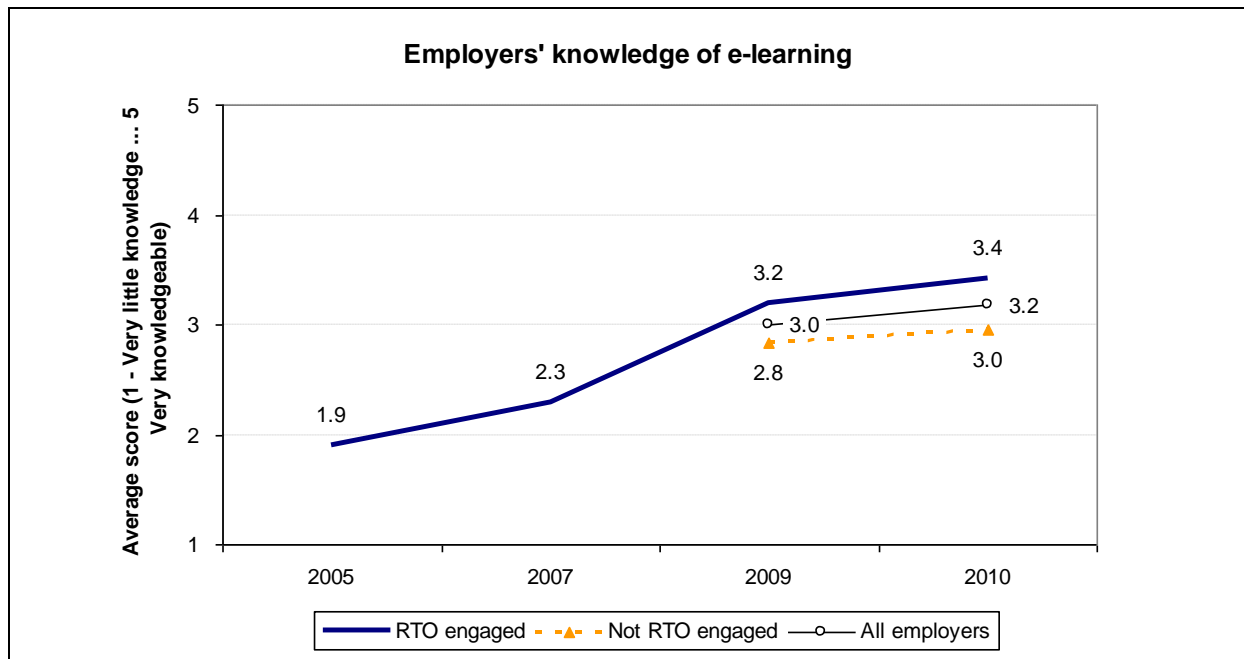
There were some small differences between the use of different types of training by employers in different states and territories, with use of more formal accredited training approaches lower in the NT and ACT than in the states. Use of vocational qualifications, apprenticeships/traineeships and nationally recognised training was highest among Tasmanian employers.



Knowledge of e-learning

Employers' knowledge of e-learning has increased over the past five years. In 2010, 18% of employers who were engaged with a RTO indicated that they were 'very knowledgeable' about e-learning, compared with 22% in 2009 and only 4% in 2007 and 2005. As in 2009, 47% of RTO engaged employers who believe their knowledge of e-learning rates 4 or 5 out of 5, compared with only 16% in 2007 and 14% in 2005. The average 'knowledge' score increased from 1.9 out of 5 in 2005 to 2.3 in 2007, 3.2 in 2009 and 3.4 in 2010.





The reported level of knowledge across all employers is not reliant on current engagement with a RTO, as even 36% of employers (in 2010 as in 2009) who do not currently have employees undertaking accredited training reported knowledge of e-learning at 4 or 5 out of 5. However, among this group there were still 33% of employers who said they had very little knowledge of e-learning (average score 3.0 out of 5).

Use of e-learning in Australian organisations

Overall, 50% of employers surveyed in 2010 use e-learning in either structured or unstructured training provided to their employees, compared with 40% in 2009.

The use of e-learning in structured training within organisations varies between those that are currently engaged with a RTO and those that are not. Overall, 40% of employers said that to some degree the training they provide to employees involves e-learning, although the figure was 49% for RTO engaged employers compared with 31% for those who do not currently have employees undertaking accredited training. Across all employers these results were higher than reported in 2009, (35% overall, 41% RTO engaged, 28% not RTO engaged), indicating increased uptake of e-learning by employers over the past 12 months.

The same was true for the use of e-learning in unstructured training within organisations, where there was an increase in the proportion of employers reporting use of e-learning (30% in 2010, compared with 24% in 2009). Again, the level of uptake of e-learning was higher among those employers that were engaged with an RTO than those who were not.

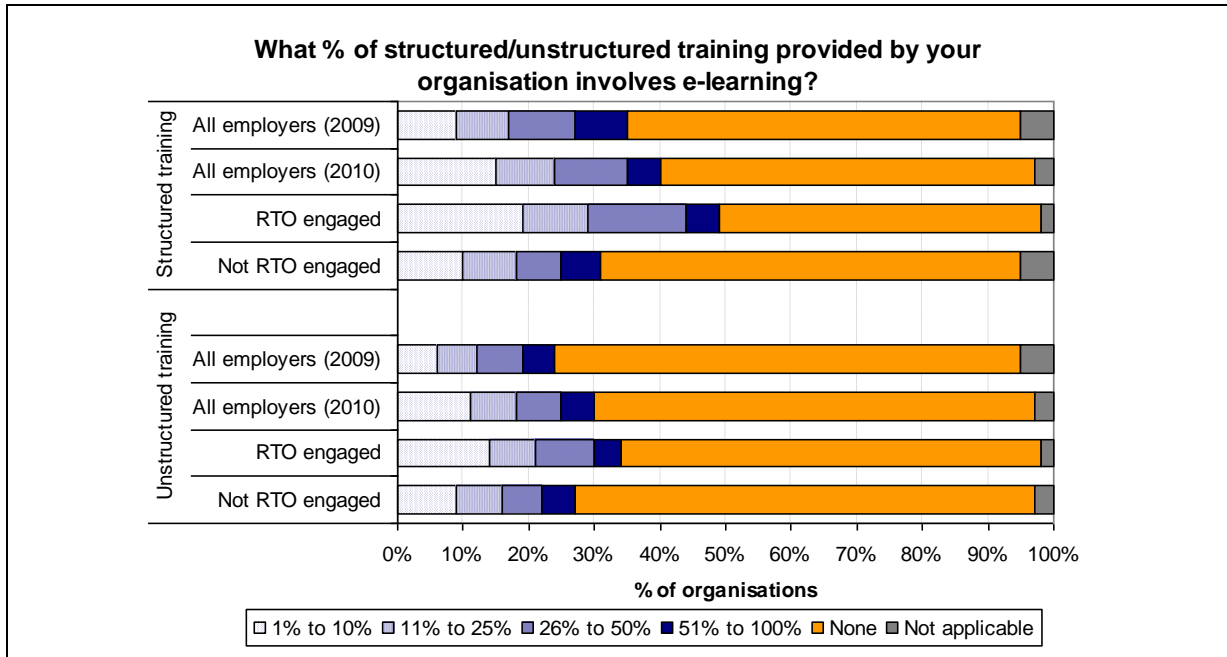
When employers were asked about the way they used e-learning, the most common use was in training related to industry or workplace specific knowledge and skills. Twenty-nine percent of all employers (more than half of those using e-learning), used e-learning to support employees' development of industry or workplace specific skills. Twenty percent used e-learning in developing knowledge and awareness of company policies and procedures. Other areas where e-learning were used included OHS training (16% of all employers), induction/orientation (15%), product knowledge (13%), workplace related software knowledge (12%) and computer training (11%).

"[We use e-learning in] compliance training, things like bullying and harassment, environmental awareness, company policies and procedures, and modules in relation to finance and things like that." (Dairy manufacturer)

“It’s information about fatigue and some in house courses like safe working, self management, segregation training and eight courses involving rigid lever changing points.” (Rail company)

“Manual handling, armed robbery response, chemical handling, environmental awareness, workplace diversity and harassment.” (Hospitality employer)

“[Our e-learning course] basically goes through all the theory of coffee and what our expectations are – quality control, standards and everything about the franchise.” (Coffee franchise)



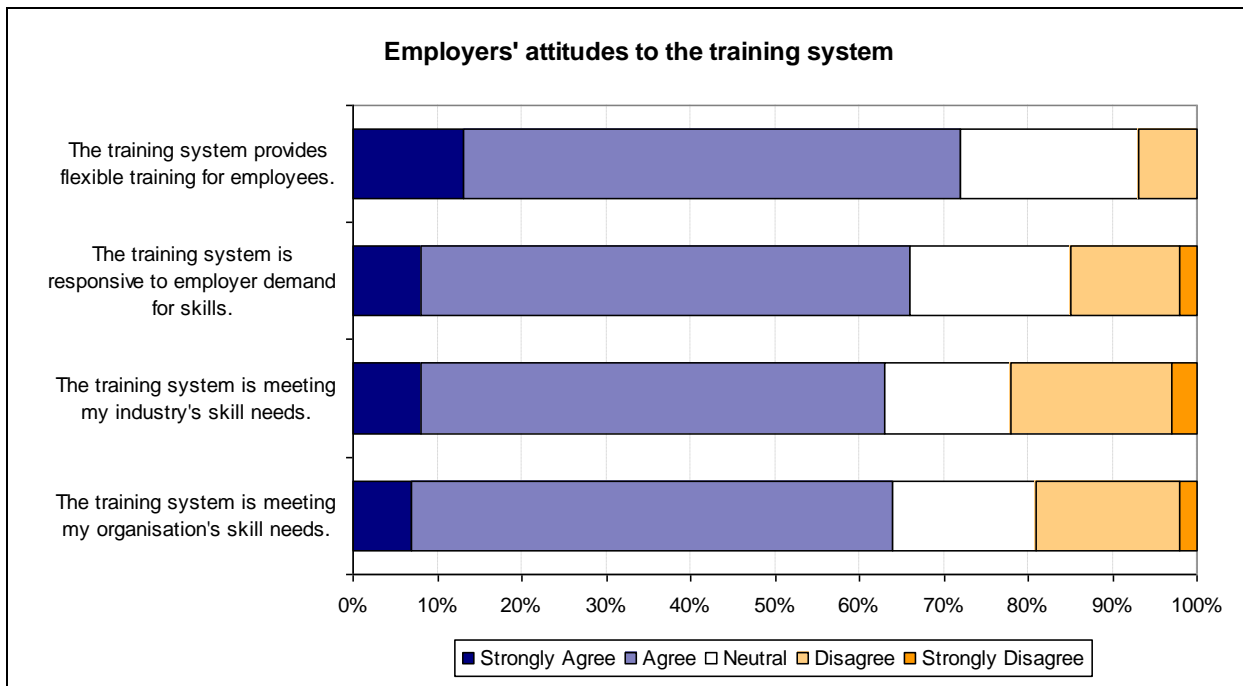
Employers who are using e-learning as part of their training provision are accessing e-learning training resources from a number of different sources, and in some cases multiple sources. The most common is via a RTO, with 53% of employers using e-learning saying that a RTO provided or assisted in the development of e-learning resources.

Forty-nine percent of these employers said that e-learning resources had been developed in-house, with 35% saying e-learning resources had been developed by an external organisation that was not a RTO.

When all employers were asked whether they thought there would be increased use of e-learning over the next two years in training they provided to their employees, 60% of employers said ‘Yes’ (compared with 49% in 2009). Thirty-two percent thought there would not be an increase, with 8% undecided. The response was higher among those organisations who currently have employees undertaking accredited training (67% vs 53% for those who do not), and higher in SA (72%) and NSW (66%) than in ACT (38%), NT (50%) and WA (53%).

Attitudes to training and the training system

The 2010 E-learning Benchmarking Survey of employers asked for the first time a series of questions about employers’ attitudes to the Australian training system. Around two-thirds of employers believe that the training system provides flexible training for employees, that it is responsive to employer demand for skills, and is meeting industry’s and their organisation’s skill needs. There were a greater proportion of positive responses in SA and ACT than in TAS, and more positive responses from the health care and education and training sectors than from manufacturers.

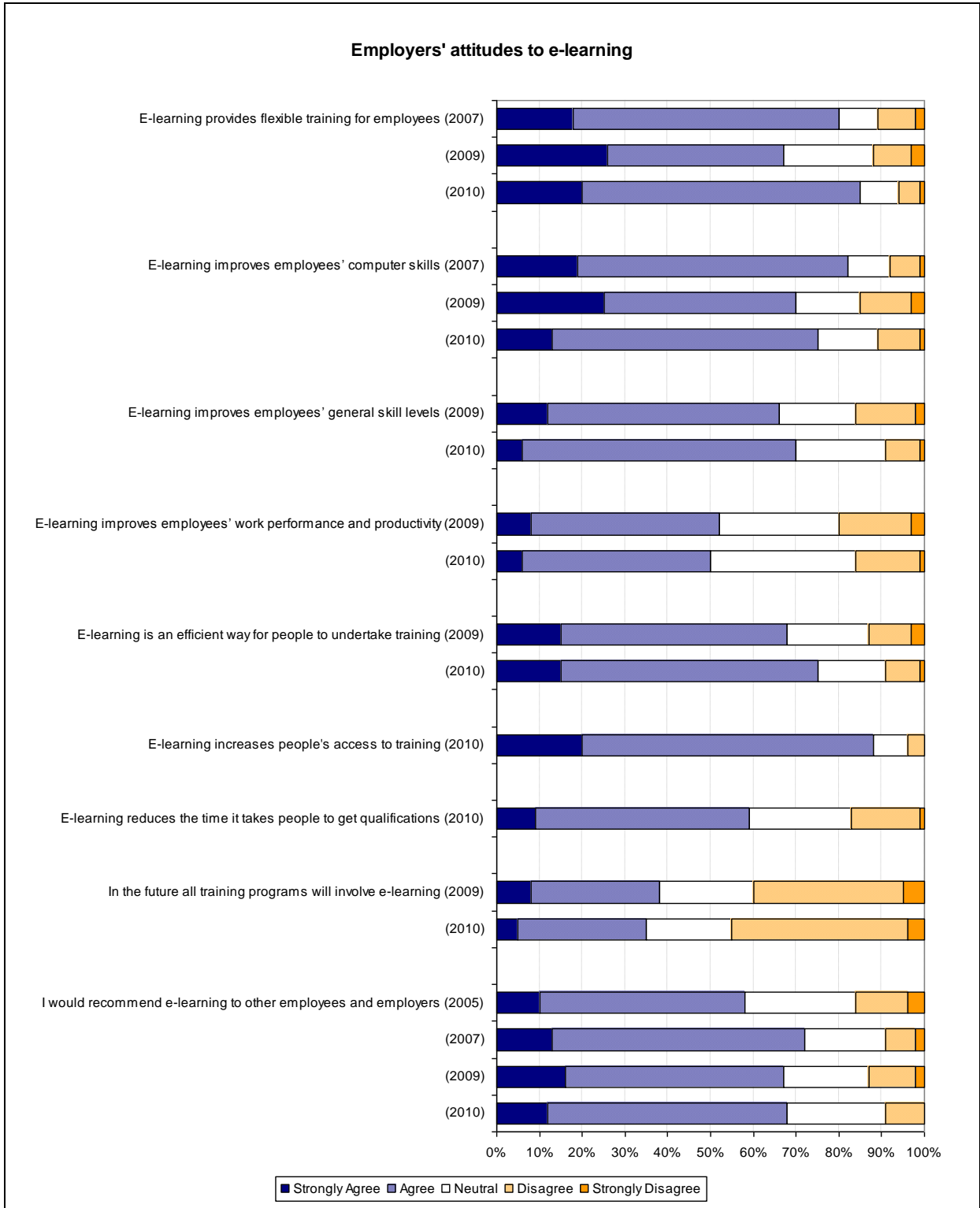


The 2010 employer survey also captured information about employers’ general attitudes to training. Consistent with the findings from previous surveys, nearly all employers (97%) agreed that employees should be able to do some of their training in the workplace. Notably, the proportion of employers that strongly hold this view has increased from 36% in 2007 to 49% in 2010. More than two thirds of employers believe that all people in the workforce need good computer skills, again with an increasing proportion of employers that now strongly have this opinion. At the same time, there are still two thirds of employers who believe employees learn better face-to-face than when using computers.

Statement	Year	Strongly Agree	Agree	Total 'Agree'
Employees should be able to do some of their training in the workplace.	2007	36%	61%	97%
	2009	44%	52%	96%
	2010	49%	48%	97%
All people in the workforce need good computer skills.	2007	14%	54%	68%
	2009	23%	42%	65%
	2010	30%	41%	71%
Employees learn better face-to-face than when using computers.	2007	21%	46%	67%
	2009	28%	38%	66%
	2010	25%	40%	65%

Attitudes to e-learning

The 2010 results on employers' attitudes to e-learning are broadly consistent with the findings in previous years, although very slightly increased on the 2009 figures. The most significant findings are that around 75% to 85% of employers believe e-learning provides flexible training for employees (85%), is an efficient way for people to undertake training (75%), and increases people's access to training (88%).



When asked whether they would encourage their employees to use e-learning if it was available, 85% of employers said that they would (compared with 81% in 2009 and 85% in 2007). In explaining their answers respondent's reasons were straightforward, with flexibility and efficient access to training the key factors:

- Offers flexibility (24% of all respondents)
- Can access and train at any time (19%)
- Easy to use (18%)
- Opens up learning opportunities and access to other resources and knowledge (14%)
- Improves skill levels and personal development (14%)
- Can learn at own pace, speed and skill level (13%)
- Time saving and time efficient (12%)
- No need to travel to learning centre (9%).

"The nurses can access the internet any time and do it in their own time – in the middle of the night if they are on night duty."

"A lot of their training is on the mainland. [E-learning provides] better access and [is] more cost effective."

"Anything that gives better access and flexibility to training is worthwhile."

"At the moment they do a face-to-face component and it takes time out of the workplace. E-learning provides flexibility. Sometimes you have some downtime here so you can fill your day with training."

This response was remarkably consistent across the VET system with the 'Yes' response in NSW, VIC, QLD, WA, TAS and among both RTO engaged and non-RTO engaged employers between 85% and 87%.

Some employers expressed caution in encouraging employees to use e-learning, suggesting that it would be useful in certain circumstances, depending on the content of the training and the individual's preferred learning style.

The feedback from those employers that would not recommend e-learning to their employees came down to one core theme – *"E-learning is not suitable for this type of business. Our employees need practical face-to-face training."* However, as noted in previous reports on E-learning Benchmarking Surveys of employers, VET teachers/trainers, VET students and RTOs, even in industries where there is a relatively high rate of non-encouragement of e-learning, there are still many more persons in that industry who would encourage their employees to use e-learning if it was available.

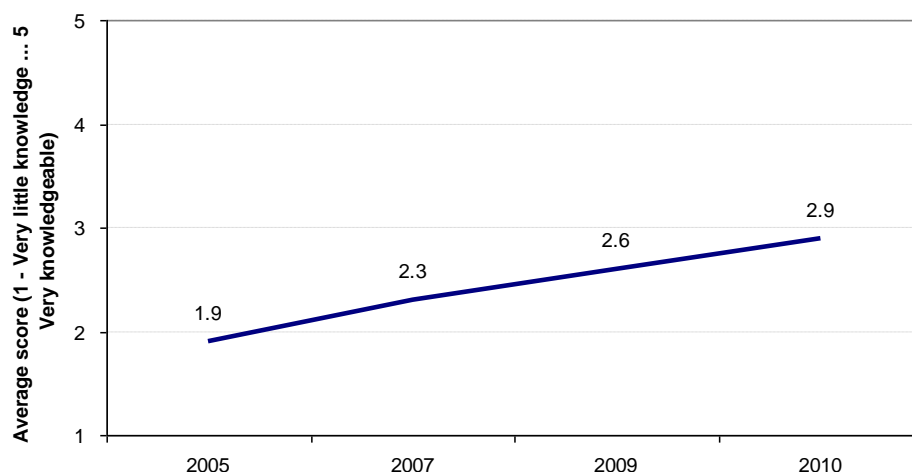
Flexible training provision

In 2010, employers with employees undertaking accredited training with a RTO reported having a moderate degree of knowledge of the e-learning services offered by their training provider. With roughly a third of respondents rating their knowledge of their training provider's e-learning services at 4 or 5 out of 5, and a third at 3 out of 5, there was still one third who rated their knowledge at 1 or 2 out of 5. Notably the proportion of employers who rated their knowledge of their RTO's e-learning services at 1 out of 5 has fallen from 54% in 2005 to 21% in 2010. In keeping with other findings in this report, this suggests a growing awareness and understanding of the role of e-learning in flexible training provision. The average rating was 2.9 out of 5, continuing a steady increase since 2005.

Using a 1-5 scale where 5 is very knowledgeable and 1 is very little knowledge, overall how knowledgeable would you say you are about e-learning services offered by your training provider?

	5 – Very knowledgeable	4	3	2	1 – Very little knowledge	Average
2005	4%	10%	15%	17%	54%	1.9
2007	4%	12%	27%	20%	38%	2.3
2009	15%	14%	20%	17%	34%	2.6
2010	13%	19%	33%	14%	21%	2.9

Employers' knowledge of e-learning services provided by their RTO



Employers' satisfaction with the e-learning services provided by RTOs is moderate, with 11% 'very satisfied' and 11% 'very dissatisfied'. Forty-six percent of employers rated their satisfaction at 3 out of 5, with an overall average satisfaction score of 3.1 out of 5.

Using a 1-5 scale where 5 is very satisfied and 1 is very dissatisfied, overall how satisfied would you say you are with the e-learning offered by your training provider?

	5 – Very satisfied	4	3	2	1 – Very dissatisfied	Average
2009	13%	18%	42%	10%	17%	3.0
2010	11%	23%	46%	9%	11%	3.1

Forty-two percent of employers said that they would prefer their training provider to deliver more training using e-learning (vs 43% in 2009).

When asked if they would try to influence their training provider to deliver more flexible training to their employees, 65% of employers said that they would (compared with 61% in 2007). While this question was not directly linked to influence on the use of e-learning, a majority of employers are wanting training that is more flexible in terms of training time and location, easier to access, more workplace-based, allows employees to train at their own pace and gives employees options to select training programs that suit their different learning styles.

Further analysis

This report presents the national responses to the Framework's 2010 E-learning Benchmarking Survey of employers.

Given the volume and type of data captured, the scope exists for further analysis of the survey results to more fully explore trends in employers use of and attitudes to e-learning, their relationship with training organisations and their use of e-business services provided by their training organisations. The full results from the 2010 survey, including breakdowns by state and territory, industry sector and employer size will be published in the coming months on the Framework's E-learning Indicators website:

<http://flexiblelearning.net.au/e-learningindicators>

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Appendix 1: Definitions of e-learning and e-business

E-learning

The Framework's E-learning Benchmarking Surveys of employers have used the following definition of e-learning.

E-learning uses electronic media to deliver flexible vocational education and training.

It includes:

- access to, downloading and use of web, CD-ROM or computer-based learning resources in the classroom, workplace or home
- online access to and participation in course activities (eg online simulations, online group discussions)
- directed use of the internet, mobile and voice technologies for learning and research purposes
- structured learning-based email communication
- online assessment activities.

It does not include:

- email dissemination of course information
- email communication between a teacher/trainer and learner on a single learning issue
- online administration of learning activities.

E-business

When asking training providers and VET students about the provision of and use of e-business services (in surveys conducted in 2005, 2007 and 2009) the following services were identified:

- online publication of general course information and relevant policies, regulations and strategies
- online enrolment
- online payments and electronic forms
- online access to student records
- online library services
- online information on student support services
- online access to and delivery of student support services
- online access to results.

Appendix 2: 2010 Employer survey

The 2010 Employer E-learning Benchmarking Survey captured information from employers about the use, uptake and impact of e-learning, the training provided by their organisation and their attitudes to the use of e-learning. A copy of the 2010 survey is provided for reference.

Screeners A Hello, I'm XYZ from Chant Link & Associates, a market research firm based in Melbourne. We are conducting a survey related to vocational education and training for the Australian Flexible Learning Framework. Can I speak with the person responsible for employee vocational education and training? Training includes in-house training and accredited training delivered through a TAFE or other registered training organisation (that is a RTO)?

- 1 Yes, continue
- 2 No, (Arrange call back if person exists, terminate if no appropriate respondent in organisation)

Screeners B (Confirm person is responsible for VET, then:) The survey takes between 8-12 minutes to complete depending upon your responses. All responses you give will be treated in confidence. Would you be available to participate?

- 1 Yes, continue
- 2 No, terminate

Screeners C Do you have currently or have you had in the past 12 months an employee undertaking vocational education and training through a RTO as part of their employment? For example, TAFEs, private RTOs, enterprise RTOs, ACE RTOs.

- 1 Yes, continue (quota n = 400)
- 2 No (Proceed for the first n = 400 and skip Q13-17 inclusive. Terminate at this point after quota of 400 is reached)

Instr. I would like to ask you some questions about the structured and unstructured **training provided by your organisation** to your employees.

Q1 What **types of training** are used by your organisation?

1 Vocational qualifications [Note: Certificate 3, Diploma etc]	Yes	No
2 Apprenticeship or traineeship	Yes	No
3 Nationally recognised training [Note: Training that leads to a nationally recognised qualification, can include whole courses or components of a course]	Yes	No
4 Unaccredited formal training [Note: Training that does not lead to a nationally recognised qualification. It is structured training and can include short courses, product specific training, and industry specific or technical training]	Yes	No
5 Unaccredited informal training [Note: Unstructured ad hoc training that does not lead to a nationally recognised qualification]	Yes	No

Q2 Overall, how would you rate the current skill level of your employees relative to the **current needs** of the organisation? Is the current skill level:

Above what is required	1
Adequate	2
Below what is required	3
Can't say	4

Q3 Overall, how would you rate the current skill level of your employees relative to the **future needs** of the organisation? Is the current skill level:

Above what is required	1
Adequate	2
Below what is required	3
Can't say	4

Instr. I would now like to ask you some questions about **e-learning**. E-learning uses electronic media such as the internet, computer-based, mobile and voice technologies to deliver flexible vocational education and training.

Q4 Using a 1-5 scale where 5 is 'very knowledgeable' and 1 is 'very little knowledge', overall **how knowledgeable** would you say you are about e-learning?

Q5 Does the **structured training** (ie short courses, product training, technical training etc) provided by your organisation involve e-learning? Yes No NA
If 'Yes', approximately what percentage of structured training provided by your organisation involves e-learning?

Q6 Does the **unstructured training** (ie ad hoc onsite training) provided by your organisation involve e-learning? Yes No NA
If 'Yes', approximately what percentage of unstructured training provided by your organisation involves e-learning?

Skip Q7-8 for those who said 'no' at Q5 and Q6

Q7 What training does your organisation deliver via e-learning?
Open ended

Q8A Have the e-learning training resources used by your organisation been developed within your organisation? Yes No Don't know

Q8B Have the e-learning training resources used by your organisation been developed by a RTO? Yes No Don't know

Q8C Have the e-learning training resources used by your organisation been developed by an external organisation that is not an RTO? Yes No Don't know

Q9 Do you think that there will be **increased use** of e-learning in training provided by your organisation in the next two years? Yes No Don't know

Instr. For each of the following statements please indicate the extent to which you agree or disagree with each using the following scale: SA – Strongly Agree, A – Agree, N – Neutral, D – Disagree, SD – Strongly Disagree, (DK – Don't know / refused / NA)

Q10 Thinking about **the Australian training system generally**, to what extent do you agree or disagree that:

10A The training system provides flexible training for employees. SA A N D SD DK

10B The training system is responsive to employer demand for skills. SA A N D SD DK

10C The training system is meeting my industry's skill needs. SA A N D SD DK

10D The training system is meeting my organisation's skill needs. SA A N D SD DK

Thinking about **your organisation's education and training experience**, to what extent do you agree or disagree that:

10E Employees should be able to do some of their training in the workplace. SA A N D SD DK

10F All people in the workforce need good computer skills. SA A N D SD DK

10G	Employees learn better face-to-face than when using computers.	SA	A	N	D	SD	DK
Q11	Thinking about e-learning and your organisation’s education and training experience, to what extent do you agree or disagree that:						
11A	E-learning provides flexible training for employees.	SA	A	N	D	SD	DK
11B	E-learning improves employees’ computer skills.	SA	A	N	D	SD	DK
11C	E-learning improves employees’ general skill levels.	SA	A	N	D	SD	DK
11D	E-learning improves employees’ work performance and productivity.	SA	A	N	D	SD	DK
11E	E-learning is an efficient way for people to undertake training.	SA	A	N	D	SD	DK
11F	E-learning increases people’s access to training.	SA	A	N	D	SD	DK
11G	E-learning reduces the time it takes people to get qualifications.	SA	A	N	D	SD	DK
11H	I would recommend e-learning to other employees and employers.	SA	A	N	D	SD	DK
11I	In the future all training programs will involve e-learning.	SA	A	N	D	SD	DK
Q12	Would you encourage your employees to use e-learning if it was available? Why? OR Why not?	Yes	No	Open ended			

Skip Q13-17 for those who said ‘no’ at Screener C

Q13	What is the name of your training provider (if more than one, think of main provider)?	
Q14	Using a 1-5 scale where 5 is ‘very knowledgeable’ and 1 is ‘very little knowledge’, overall how knowledgeable would you say you are about e-learning offered by your training provider?	
Q15	Using a 1-5 scale where 5 is ‘very satisfied’ and 1 is ‘very dissatisfied’, overall how satisfied would you say you are about e-learning offered by your training provider?	
Q16	Would you prefer your training provider to deliver more training using e-learning?	Yes No
Q17	Would you try to influence your training provider to deliver more flexible training to your employees?	Yes No
Q18	In what industry sector does your business operate?	

Q19	How many employees in your business?	Less than 10	1
		10-19	2
		20-99	3
		100-499	4
		500-999	5
		1,000 or more	6
		Don't know / refused	7

Q20	How many of your employees would have undertaken vocational education and training through an RTO in the past 12 months?	1 to 4	1
		5 to 9	2
		10-19	3
		20-49	4
		50 or more	5
		Don't know / refused	6

Q21	In what state or territory is your business located? (If more than one, ask for this person's location)	VIC	1
		NSW	2
		QLD	3
		SA	4
		WA	5
		TAS	6
		NT	7
		ACT	8

Q22	Would you like to know more about e-learning in vocational education and training?	Yes	No

Close Thank respondent for their time.

Appendix 3: Survey response profile

The 2010 Employer E-learning Benchmarking Survey had responses from 800 employers.

Call profile

The call profile to reach the targeted level of survey responses is shown below.

Call status	2010	2009	2007	2005
Total number dialled	8,511	13,424	7,081	10,021
Disconnected/Telstra message/etc.	1,506	3,564	807	1,503
Connections	7,005	9,860	6,274	8,518
No contact (engaged/no answer)	1,172	2,742	738	1,211
Contacts	5,833	7,118	5,536	7,307
Residential number	481	1,012	170	570
Language/communication issue	49	94	36	43
Duplicate number	0	38	-	-
Business contacts	5,303	5,974	5,330	6,694
Business contact efficiency (as % of number dialled)	62%	45%	75%	67%
Refused to participate	2,148	3,372	1,516	1,198
Not available for duration of survey	1,972	1,501	1,055	1,470
Business prospects	1,183	1,101	2,759	4,026
Business prospect response (as % of contacts)	22%	18%	52%	60%
Quota fail (no employees, quota full)	383	192	2,359	3,625
Completed survey	800	909	400	401
Completion rate (as % of contacts)	15%	15%	8%	6%

The number of calls required to reach business contacts (8,511) was significantly lower than in 2009 due to a higher business contact efficiency (62% vs 45%). The willingness of employers to participate in the survey was also slightly higher than in 2009 (22% vs 18%, although well down on 2005 and 2007), however the overall completion rate remained at 15%. The change in methodology to capture both VET engaged and non VET engaged employers from 2009 has been achieved with very little additional business contact burden.

Employer profile

Sample sizes were set at a total of 800 respondents, of which 400 were for employers with employees currently undertaking accredited training with a RTO (representing recent experience with the VET system). This was equivalent to the population surveyed in the previous years' surveys, which were also a sample of 400 businesses.

State/Territory	Sample size						
	2005 (VET)	2007 (VET)	2009* (VET)	2009* (full)	2010 (VET)	2010 (full)	2010 (full)
NSW	109	107	158	282	113	210	26%
VIC	80	74	101	189	75	150	19%
QLD	60	60	70	147	60	120	15%
WA	40	39	29	74	38	80	10%
SA	27	31	25	67	29	60	7.5%
TAS	28	30	9 (23)	20 (50)	32	60	7.5%
NT	29	30	2 (25)	7 (50)	26	60	7.5%
ACT	27	29	6 (25)	15 (50)	27	60	7.5%
Total	400	400	400	801	400	800	800

* In 2009, the interviewers initially surveyed employers to fill sampling quotas based on the proportion of the Australian population in each state and territory. Additional sampling beyond the 800 threshold was undertaken to ensure that there were sufficient results for analysis and publication of both 'VET' and 'full' results for every state and territory, including TAS, NT and ACT. These additional responses were not included in the 'national' results shown in the 2009 Employer E-learning Benchmarking Survey report.

Number of employees	2007 (VET)	2009 (VET)	2009 (full)	2010 (VET)	2010 (full)
Less than 10	38%	30%	47%	6%	18%
10 - 19	24%	21%	17%	7%	12%
20 - 99	20%	18%	17%	28%	25%
100 - 499	12%	18%	12%	41%	33%
500 - 999	3%	5%	3%	9%	6%
1,000 or more	3%	8%	4%	9%	6%
Refused to answer	0%	-	-	-	0%
Total	400	400	801	400	800

Number of employees undertaking VET units in last 12 months	2007 (VET)	2009 (VET)	2009 (full)	2010 (VET)	2010 (full)
None	-	-	25%	-	24%
1 - 4	55%	40%	34%	14%	18%
5 - 9	18%	15%	10%	13%	10%
10 - 19	8%	11%	6%	15%	10%
20 - 49	7%	8%	5%	20%	12%
50 or more	10%	17%	10%	31%	19%
Don't know/refused	2%	9%	10%	7%	7%
Total	400	400	801	400	800

Industry sector*	2009 (VET)	2009 (full)	2010 (VET)	2010 (full)
Manufacturing	9%	10%	18%	15%
Health Care and Social Assistance	14%	12%	17%	14%
Retail Trade	13%	16%	8%	13%
Education and Training	5%	6%	10%	10%
Accommodation and Food Services	9%	9%	9%	8%
Professional, Scientific and Technical Services	8%	10%	5%	8%
Construction	6%	5%	12%	8%
Other Services	8%	8%	3%	3%
Information, Media and Telecommunications	1%	1%	2%	3%
Arts and Recreation Services	2%	2%	2%	3%
Wholesale Trade	1%	3%	3%	3%
Transport, Postal and Warehousing	3%	3%	3%	3%
Agriculture, Forestry and Fishing	2%	3%	2%	2%
Financial and Insurance Services	5%	4%	2%	2%
Administrative and Support Services	5%	5%	1%	2%
Public Administration and Safety	4%	2%	2%	2%
Electricity, Gas, Water and Waste Services	1%	1%	1%	1%
Mining	2%	1%	0%	0%
Rental, Hiring and Real Estate Services	2%	2%	-	0%
Total**	400	801	400	800

* These industry classifications are based on the ABS classification of industry.

** Some employers operate in more than one sector.