European-wide e-Learning Recognition Review Report

--- EXTRACT ---

--- UNITED KINGDOM COUNTRY REPORT ---

SMEs & e-LEARNING (SMEELEARN) PROJECT

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Introduction

The development and revival of SMEs in the UK is dependent on a number of factors. Current research seems to suggest an increase in the number of people employed although this is not reflected in increased productivity. Business analysts suggest that primary areas for growth include the development of, and access to, e-learning and ICT as a means of communication, business development and training. Currently, e-learning is creating a wealth of opportunities to combine employment with studying. 'In 2013/14, there were 210,005 UK-based students studying for both undergraduate and postgraduate degrees in the UK, of which 150,255 were with the Open University' (The Guardian 2015) UK universities have continued to develop partnerships with business providers increasing the potential to engage in e-learning and open up research opportunities.

A recent study by Brunel University and business product marketplace Applegate, considered the way digitisation is driving the evolution of British businesses of all sizes and the status of digital business in the UK. Although the study noted that larger businesses were leading the field in comparison to SMEs it provided a "snapshot" of the current position. The research noted that 98% have a company website; 88% make extensive use of online banking; 64% find more than half of their suppliers online; 63% expect digitisation to further improve customer satisfaction; 53% provide remote access to staff; 52% research customer requirements online; 46% have an intranet; 45% make more than half of their purchases online; 44% spend more than half of their marketing budget online and 41% have adapted their websites for tablets and smartphones. [Brunel 2015]

The development and exploitation of e-learning as a training mechanism has been successfully adopted by large organisations, particularly but not exclusively, within the public health sector. The National Health Service (NHS) has a long term commitment to ensuring that its workforce are equipped to maintain a high level of care and to share best practice. The eLearning Repository, funded by Health Education England, is an extensible 'search and discover platform' to support the discovery and sharing of e-Learning objects and learning resources held both within the Repository and at external locations. The range of online and e-learning initiatives is impressive including Learnbloodtransfusion - an interactive e-Learning resource developed by the Better Blood Transfusion Continuing Education Programme. [www.learnbloodtransfusion.org.uk/]; e-Learning for Healthcare [www.e-lfh.org.uk]; e-Learning resources covering chemical, biological, radiological and nuclear incidents [http://ehealthlearning.org.uk] and The Social Care Institute for Excellence (SCIE) that offer a series of freely accessible e-Learning modules covering aspects of social care and dementia. [www.scie.org.uk/publications/elearning/index.asp]

Access to learning and its relationship with profit and commercial success has led to the development of e-learning for employees in large companies. Halfords '3 Gears Programme'

includes "Structured e-learning -Retail skills -Product knowledge -Customer service" and continued training through the application of blended learning pedagogies. "Our 3-Gears training programme continued to be rolled out: by the end of FY15 nearly all store colleagues had attained Gear 1 accreditation, 46% had qualified for Gear 2, along with over 300 colleagues at Gear 3 level." [Halfords Annual Report April 2015]

Within the retail sector, Waitrose is rolling out an innovative e-learning game about the law on selling alcohol, tobacco and other age restricted products. It is the first 'gamified' training module to be used by Waitrose, part of the John Lewis Partnership, and will be available next month (July) to around 50,000 staff. The *Restricted Sales* module includes a scenario-based game where staff decide on the best course of action when confronted with 7 different situations. [Training Press Release June 2015]

It is apparent that the expansion of digital accessibility, especially with regards to Internet use, and the adaption of websites for tablets and smartphones provides an opportunity for further growth in the field of e-learning. Employee familiarity with these new technologies can facilitate an advance in e-learning although there is still some reluctance to fully exploit its potential. Companies including Barclays Bank continue to promote digital accessibility for all age through the Digital Eagles Initiative that includes a series of prime time television advertisements as part of their campaign. As knowledge of, and a desire to engage with, Internet based learning activities grows, it is important to consider the level of Internet use in the UK.
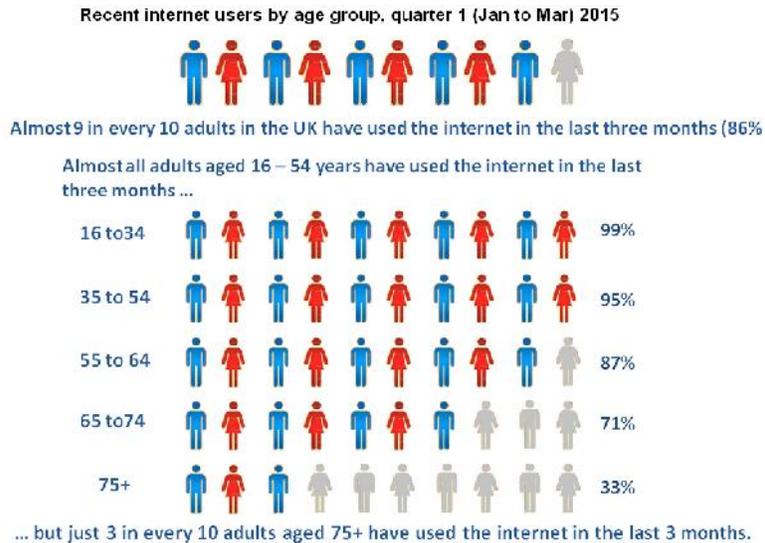
Internet Use in the UK

In the most recent "Statistical Bulletin: Internet Users, 2015", the Office for National Statistics noted that:

i.   From January to March 2015, 86% of adults (44.7 million) in the UK had used the internet in the last 3 months (recent users), an increase of 1 percentage point since the (Jan to Mar) 2014 estimate of 85%.

ii.   11% of adults (5.9 million) had never used the internet, falling by 1 percentage point since (Jan to Mar) 2014.

iii.   The South East had the highest proportion of recent internet users (90%) and Northern Ireland was the area with the lowest proportion (80%).

iv.   From January to March 2015, the proportion of adults who were recent internet users was lower for those that were disabled (68%), compared with those that were not disabled (92%). The proportion of adults aged 16 to 24 years who were recent internet users was lower for those that were disabled (95% recent users) compared

with those that were not disabled (99% recent users). Adults aged 75 years and over who were recent internet users was also lower for those that were disabled (27% recent users) compared with those that were not disabled (40% recent users).
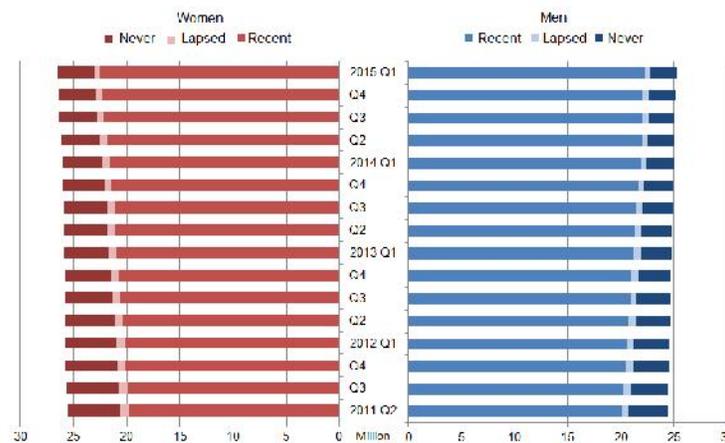
Further analysis of Internet Use in the UK may be expressed diagrammatically as follows:

[Office for National Statistics May 2015]

Internet users by gender
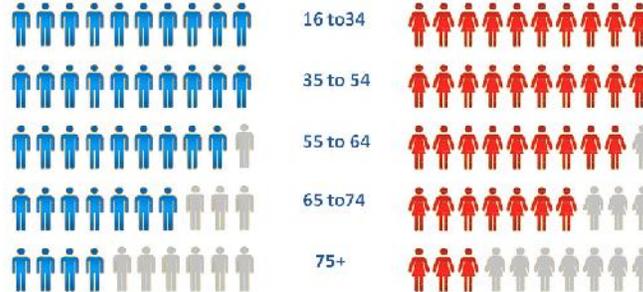UK, 2011 quarter 2 to 2015 quarter 1 [Office for National Statistics]

Recent internet users by sex and age group, quarter 1 (Jan to Mar) 2015

Almost 9 in every 10 adults in the UK have used the internet in the last three months (86%)

Almost all men and women aged 16 to 54 years have used the internet in the last three months ...

..but just 4 in every 10 men and 3 in every 10 women aged 75+ have used the internet in the last three months.

Internet non-users

UK, quarter 1 2011 to quarter 1 2015 [Office for National Statistics 2015]
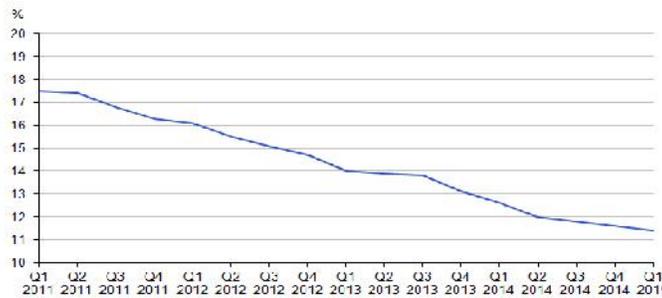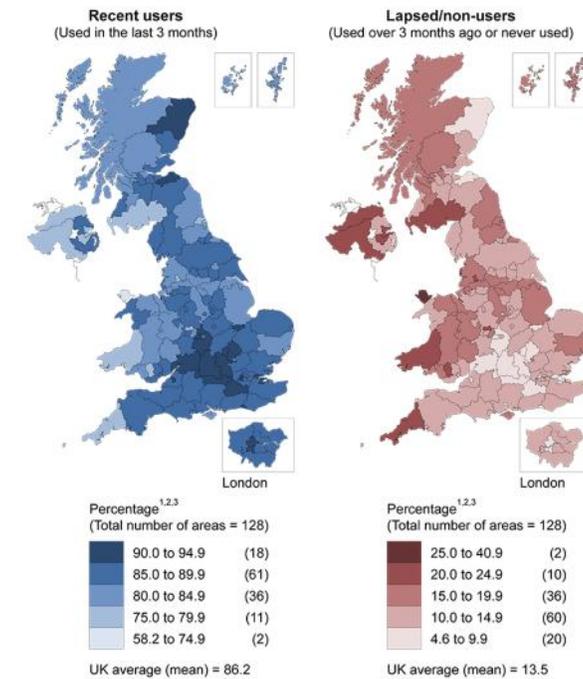

These findings are supported by the following statistics indicating internet use: "Countries by Internet Usage" (Internet Live Stats 2015) [Clarification: An Internet User is defined as an individual who has access to the Internet at home, via computer or mobile device.]

Country	Internet Users	1 Year Growth %	1 Year User Growth	Total Country Population	Penetration (% of Pop. with Internet)	Country's share of World Population	Country's share of World Internet Users
UK	57,075,826	3%	1,574,653	63,489,234	89.90%	0.88%	1.95%

UK coverage and internet use rely on continuing improvements in digital technologies. Initiatives designed to ensure that the internet is accessible nation-wide is still in progress as rural and non-urban areas continue to experience connection, broadband and mobile variations in signal. The effect on e-learning and its potential to maximise its use remains a cause for concern.

Internet use, quarter 1 (Jan to Mar) 2015, by NUTS 3 area, United Kingdom

Recent users
(Used in the last 3 months)

Lapsed/non-users
(Used over 3 months ago or never used)

London

London

Percentage[1,2,3]
(Total number of areas = 128)

90.0 to 94.9	(18)
85.0 to 89.9	(61)
80.0 to 84.9	(36)
75.0 to 79.9	(11)
58.2 to 74.9	(2)

UK average (mean) = 86.2

Percentage[1,2,3]
(Total number of areas = 128)

25.0 to 40.9	(2)
20.0 to 24.9	(10)
15.0 to 19.9	(36)
10.0 to 14.9	(60)
4.6 to 9.9	(20)

UK average (mean) = 13.5

1 Percentage of adults aged 16 or over.
2 NUTS 3 is an abbreviation for 'nomenclature of territorial units for statistics', level 3.
3 Highlands and Islands NUTS level 2 area has been used instead of the respective NUTS level 3 areas in Scotland, because of small sample sizes.
Source: Office for National Statistics licensed under the Open Government Licence v.3.0.
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UK use of e-learning

Research compiled by *e-Learning Industry* indicate that:

> ***e-learning has the potential to increase retention of information by up to 60%; nearly 25% of employees leave jobs because there is not enough room for training or development, whilst companies who offer e-learning are able to generate 26% more revenue per employee. (e-Learning Industry, 2014)***

Changes in technology, including the use of cloud-computing as a means to access e-learning within SMEs is progressing slowly. Costs implicit in updating operating systems and maintaining secure wireless and broadband connections may restrict higher levels of use by SMEs. The concepts associated with learning via cloud computing are likely to gain credence as employees become more familiar with these systems. A number of e-learning companies and their design teams offer cloud computing as an e-learning tool.

The overall picture remains variable. A recent survey indicates that 'over a million small businesses and charities still lack basic digital skills and the perceived benefits of being digital remain. For example, 25 per cent of all organisations surveyed believe digital is 'irrelevant' to them.' [Lloyds UK 2015] Clearly this influences the capability of SMEs to engage in e-Learning

although 'even if an organisation does not believe they need to be online, many of their customers already are.' [Lloyds UK 2015]

This also applies to their employees who readily engage with online technologies. The potential to access e-Learning courses, resources, advice and formal qualifications through e-Learning continues to grow. It is estimated that 74% of people use mobile devices for e-Learning in 2015; 50% of organisations are predicted to use video as part of their digital learning strategy; as 28.5% training hours are delivered via online or computer based technologies. [brayleino learning 2015]

Innovative structures are in place and accessible. The use of LMS and other learning environments are available offering a variety of costed and free resources, shared and virtual environments, in addition to traditionally created "text on the screen" applications. The capacity to share e-Learning outcomes is illustrated by examples including Team Rooms: for group projects 'where a private "virtual" room is assigned to a group of learners where they can collaborate on a project by sharing files, notes, and having Threaded Discussions and chatting in real-time.' [Connected Learning LMS 2015]

Availability of, and access to, e-Learning systems in the UK assumes that the take-up from organisations, including business – large corporations and SMEs – as well as academic and public/social institutions, will continue to grow.

In Summary

Accessing e-learning systems in the UK continues to be of interest to the majority of SMEs and larger companies. The need to economise and to encourage growth suggests that e-learning can provide a 21st century alternative to traditional training packages. The "digital divide" may be interpreted in terms of generational use and although one should not generalise, it is apparent that younger employees of large organisations are more likely to consider e-learning as the preferred means of accessing training and information. Social media, including *Facebook*, *Twitter* and *LinkedIn* are often viewed as the preferred means of communication and SMEs, sole traders and larger organisations are becoming adept at sharing, trading and training via these technological hubs. Within these areas, e-learning and SMEs continue to develop a working relationship although there seems to be a gap between what is predicted, proposed and aimed for and what is happening in practice.

The need to capitalise on the high speed broadband and the opportunity to communicate through a multi-spectrum of learning styles should provide the focus for e-learning within the UK.

LINKS

http://www.learnbloodtransfusion.org.uk/
http://www.e-lfh.org.uk
http://ehealthlearning.org.uk
http://www.scie.org.uk/publications/elearning/index.asp
http://www.elearningrepository.nhs.uk
http://www.virtual-college.co.uk/e-academies/Businesses.aspx
Statistical Bulletin: Internet Users, 2015: http://www.ons.gov.uk/ons/dcp171778_404497.pdf
Internet Live Stats 2015:
http://www.internetlivestats.com/internet-users/
eLearning Industry, 2014
http://ocbmedia.com/blog/the-top-e-learning-stats-for-2014/
http://internetretailing.net/2015/02/uk-smes-to-make-mobile-breakthrough-in-2015/
http://www.royalmailgroup.com/uk-sme-e-retailers-target-growth-through-increased-use-online-marketplace-sites-2015
http://talkbusinessmagazine.co.uk/2015/01/29/1-4-uk-smes-dont-use-business-plan/