

E-Learning and Languages

Research conducted by Vanson Bourne



Business



October 2014

TIENG VIET

ENGLISH

ITALIANO

FRANCAIS

PORTUGUES

Demographics

500 business decision makers involved in language training in private sector organisations of at least 500 employees were interviewed in September-October 2014. These were split in the following ways...

...number of employees

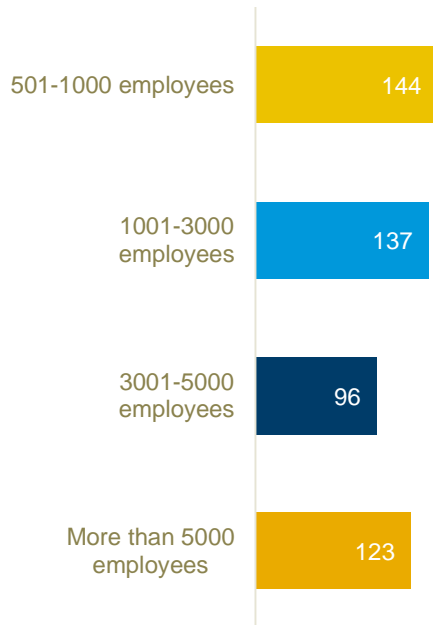


Figure D1: "How many employees work in your organisation?" (500 respondents)

...sector

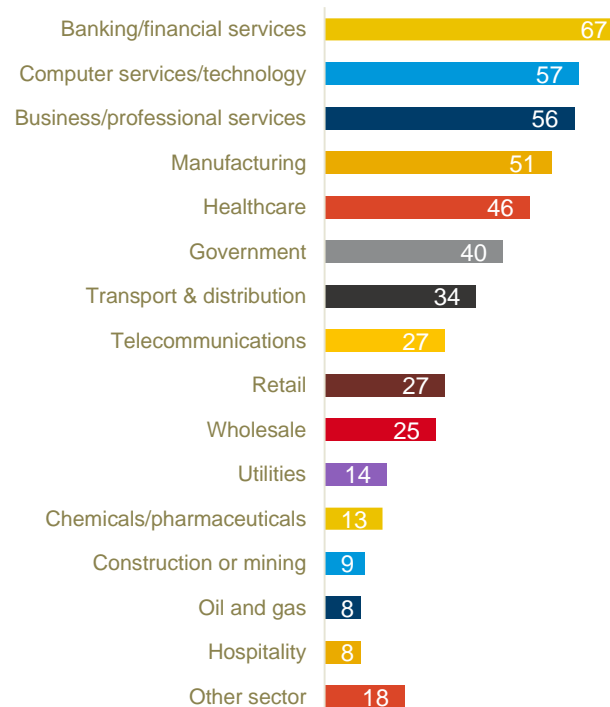


Figure D2: "Within which sector is your organisation?" (500 respondents)

...country of respondent

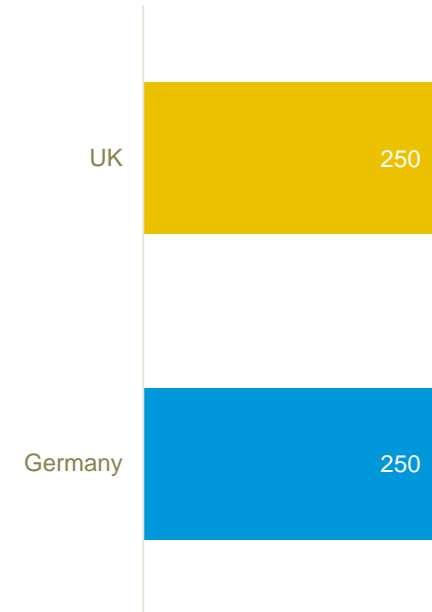


Figure D3: Country of respondent, (500 respondents)

3 areas of interest

- 1) Language use in organisations
- 2) Language training
- 3) E-learning



Business



Area 1

LANGUAGE USE IN ORGANISATIONS

The role of language skills in business success

Almost eight in ten (79%) respondents agree that language skills are critical for business success
Eight in ten (81%) respondents agree that language skills will become even more critical for business success in the future

This shows that the important role that languages play in organisations is recognised by respondents, and that this role is expected to become even more important

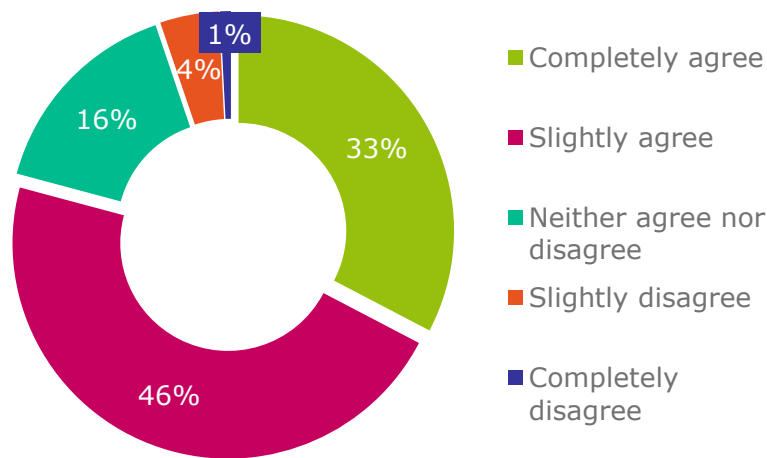


Figure 1: Agreement with the statement "Language skills are critical for business success" asked to all (500 respondents)

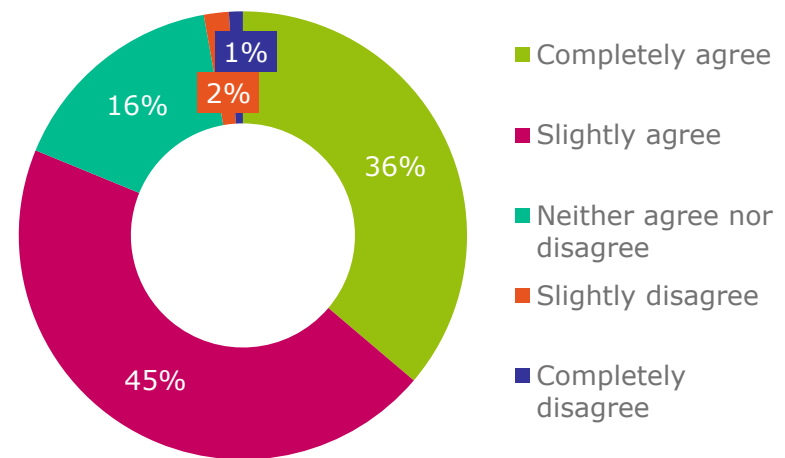
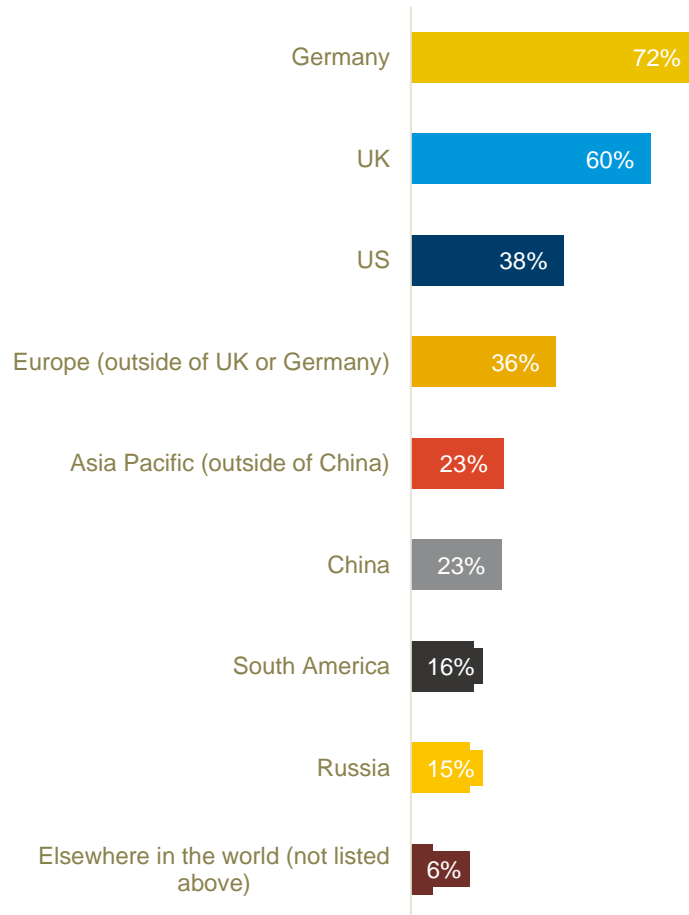


Figure 2: Agreement with the statement "Language skills will become more critical for business success in the future" asked to all (500 respondents)

How organisations are spread around the world



The majority of respondents work in organisations with offices in Germany (72%) or the UK (60%)

Around a third of respondents work in organisations that have an office in the US (38%) or Europe outside of Germany and the UK (36%)

Almost a quarter work in organisations that have an office in China (23%) or elsewhere in Asia (23%)

The variety of locations that many organisations are based in shows why at least some employees in these organisations require additional languages to carry out their role

What languages do respondents regard as critical for their organisation?

Figure 3: "Where does your organisation have offices?" asked to all (500 respondents)

The most critical languages for organisations

61% of respondents report that English is the most critical language for their organisation. A further 30% report that German is the most critical

This shows that even among UK and Germany respondents, one in ten (9%) regard another language as being the most critical for their organisation

Respondents are likely to report that either English (27%) or German (25%) is the second most critical language. A further 35% report that another language is the second most critical

Only 13% report that there is only one critical language in use in their organisation. This shows that the importance of using multiple languages is recognised in most organisations

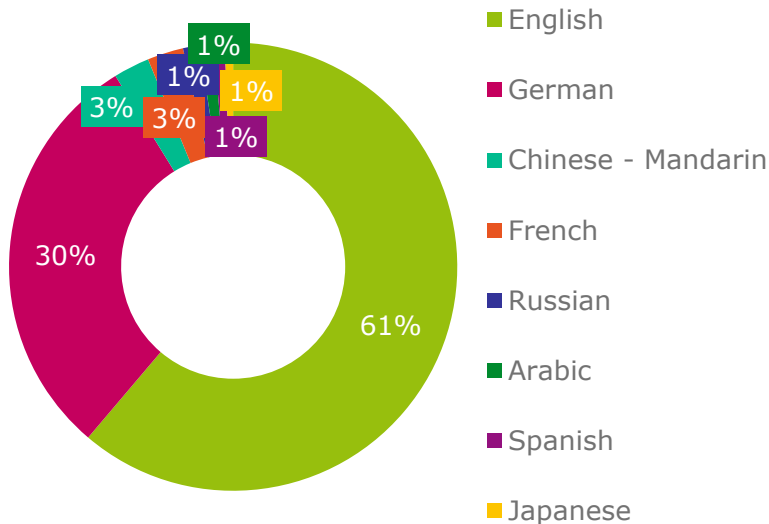


Figure 4: "Which one of these languages would you say is the single most critical language in use in your organisation?" asked to all (500 respondents)

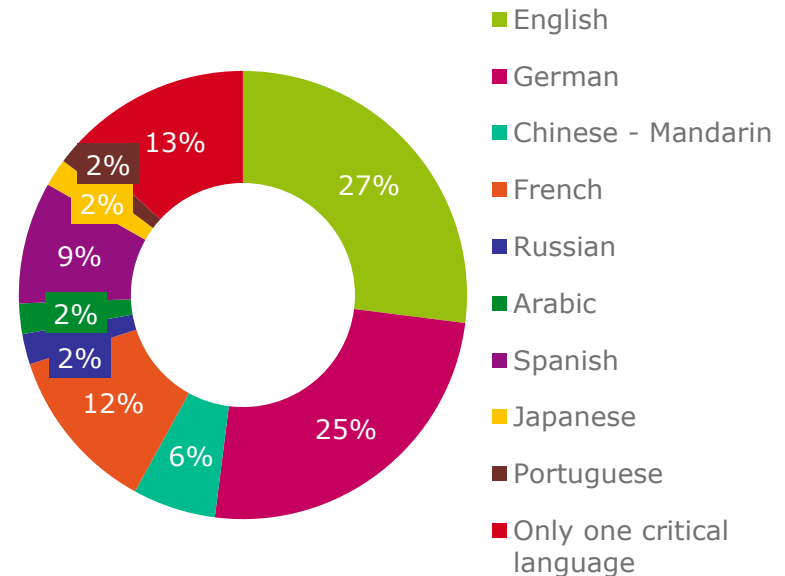


Figure 5: "Which one of these languages would you say is the next most critical language in use in your organisation?" asked to all (500 respondents)

Most critical languages for organisations – respondent from the UK

UK respondents are most likely to report that English is their organisation's most critical language (82%). A quarter report that German (27%) and French (25%) is the first or second most critical language. 13% of respondents report that Spanish is one of the most critical languages. Only 22% report that there is only one critical language used in their organisation, showing that in most organisations, English is not the sole language in use.

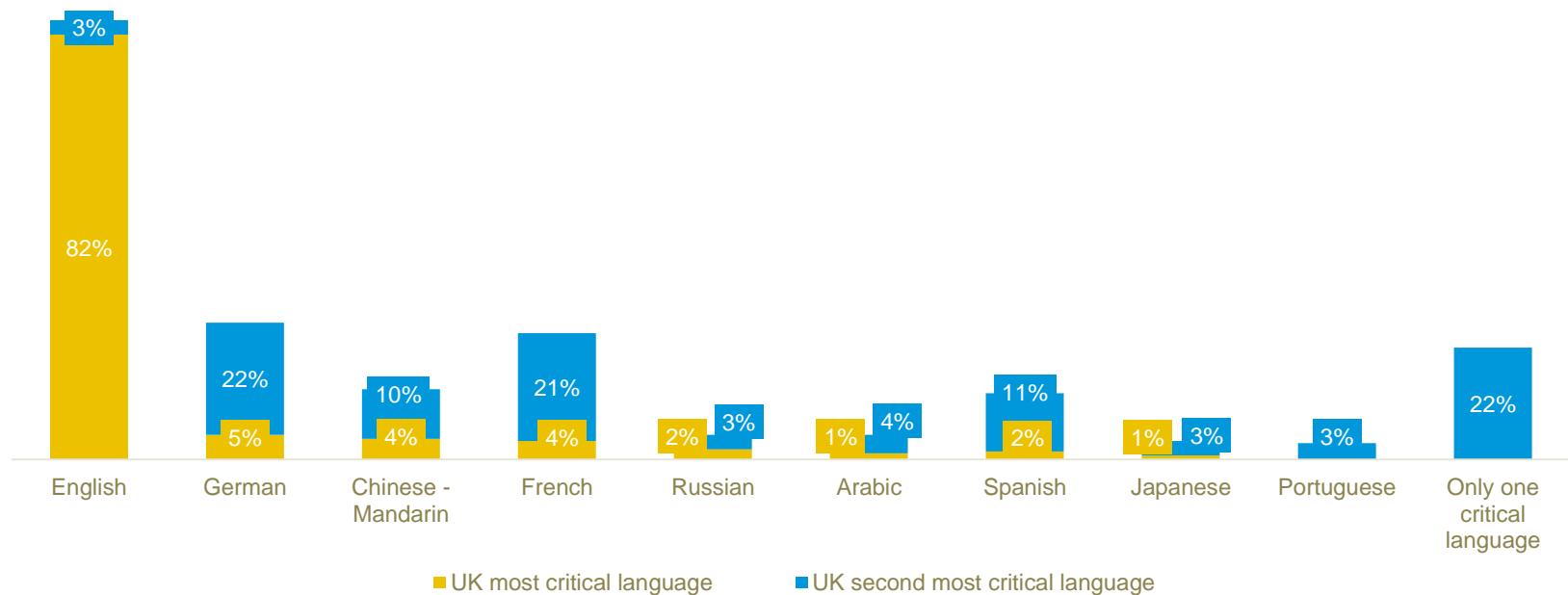


Figure 6: "Which of these languages would you say is the single most critical language, and the next most critical language in use in your organisation?" asked to those in UK (250 respondents)

Most critical languages for organisations – respondents from Germany

Respondents from Germany are most likely to report that German is their organisation's most critical language (55%), though 40% report that English is the most critical

Only 5% report that there is only one critical language used in their organisation. This shows that for almost all German respondents, use of English is almost as likely to be as important as use of German in their organisation

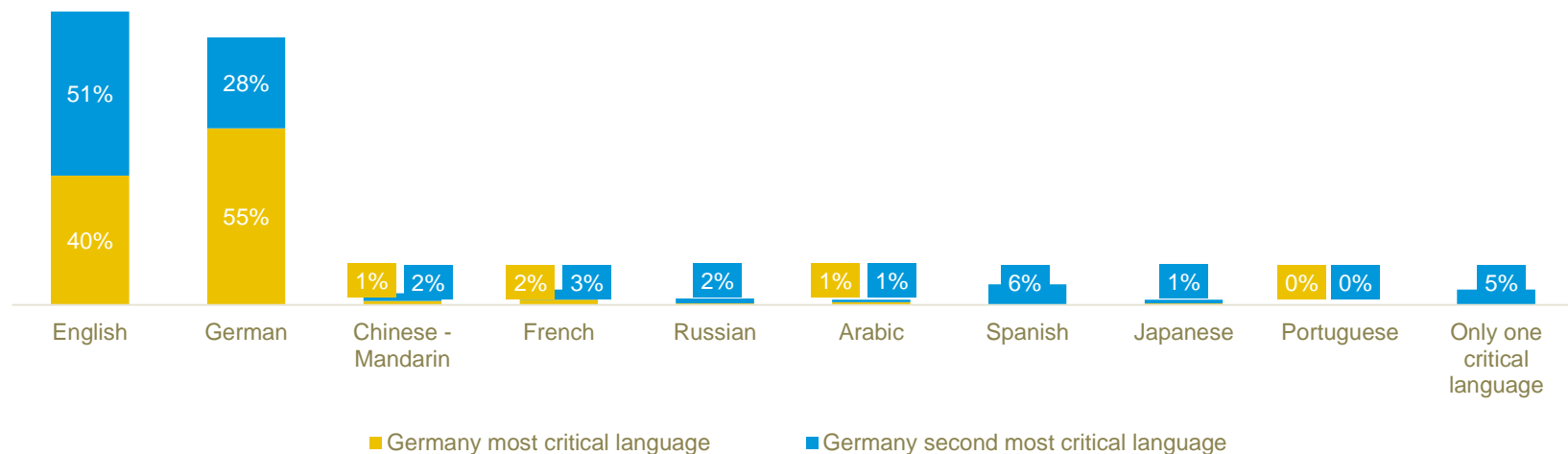


Figure 7: "Which of these languages would you say is the single most critical language, and the next most critical language in use in your organisation?" asked to those in Germany (250 respondents)

Proficiency in additional languages

Only one in ten (12%) respondents report that less than 5% of their organisation's staff require some proficiency in an additional language for their role

This shows that for most organisations, language training would not be restricted to a handful of employees, and as a result the training programmes will usually need to cater for a large number of employees

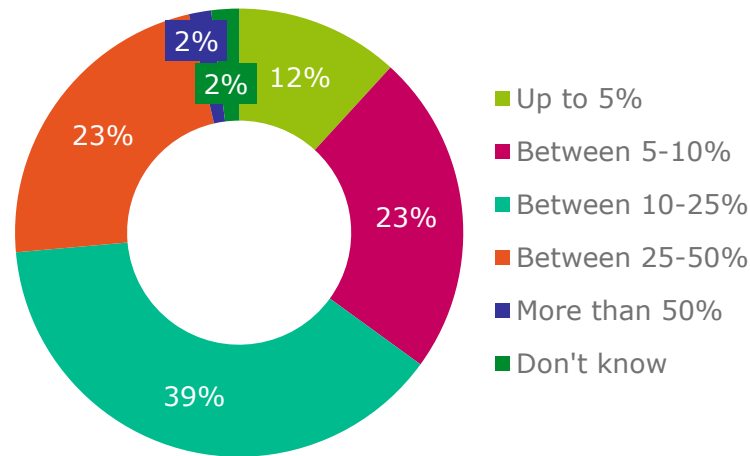


Figure 8: "Approximately what proportion of your staff require proficiency in additional languages in order to carry out their role?" asked to all (500 respondents)

According to respondents, 19% of employees on average require proficiency in an additional language

Respondents from Germany are more likely to report a higher number, 21% of employees on average requiring proficiency

This illustrates the wide use of English, which is to be expected. However, even in the UK, proficiency in an additional language is required by around 17% of employees

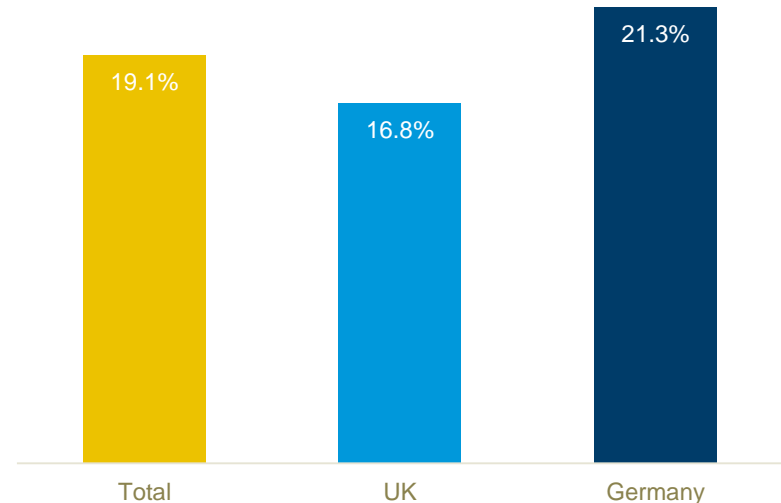


Figure 9: Average proportion of staff who require proficiency in additional languages in order to carry out their role, asked to all (500 respondents), split by country

Languages used in organisations

The least used language reported by respondents is Arabic – but even this is used by over a quarter (28%). Over half of respondents report that English (98%), German (84%), French (76%) and Spanish (58%) are used in their organisation

This shows that multiple languages are being used within most organisations

Despite the fact that UK respondents are less likely to regard additional languages as critical to their organisation, they are slightly more likely to report most languages are used to some extent in their organisation. This shows that while UK respondents are less likely to single out an individual language as critical, the majority of organisations expect a wide range of languages to be used within the business

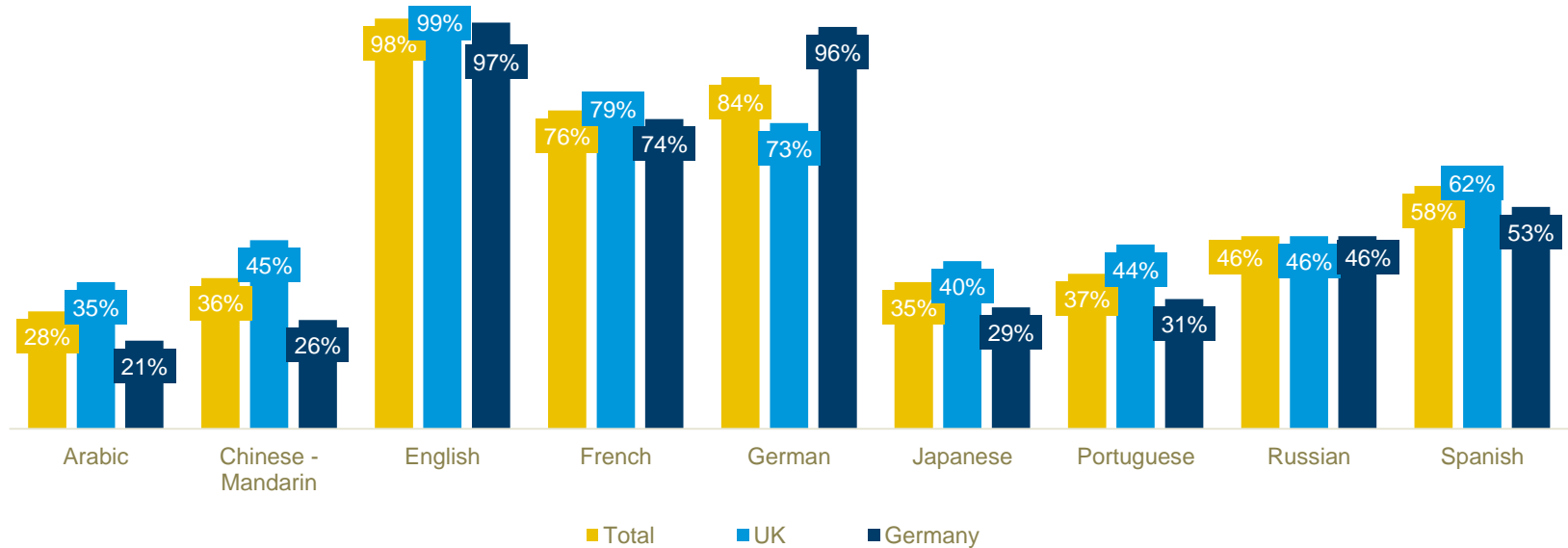


Figure 10: Languages used at all in respondents' organisation, asked to all (500 respondents), split by country

Improving language skills in organisations

Each language is reported by at least one in five respondents as requiring improvement within their organisation. 21% report that Arabic is used within their organisation but needs improvement, and 60% report that French is used but requires improvement

UK respondents are more likely to report that a given language requires improvement. This shows that even though UK respondents are more likely to report that a language is used in their organisation, it is also more likely that the language is not used to the level that is required.

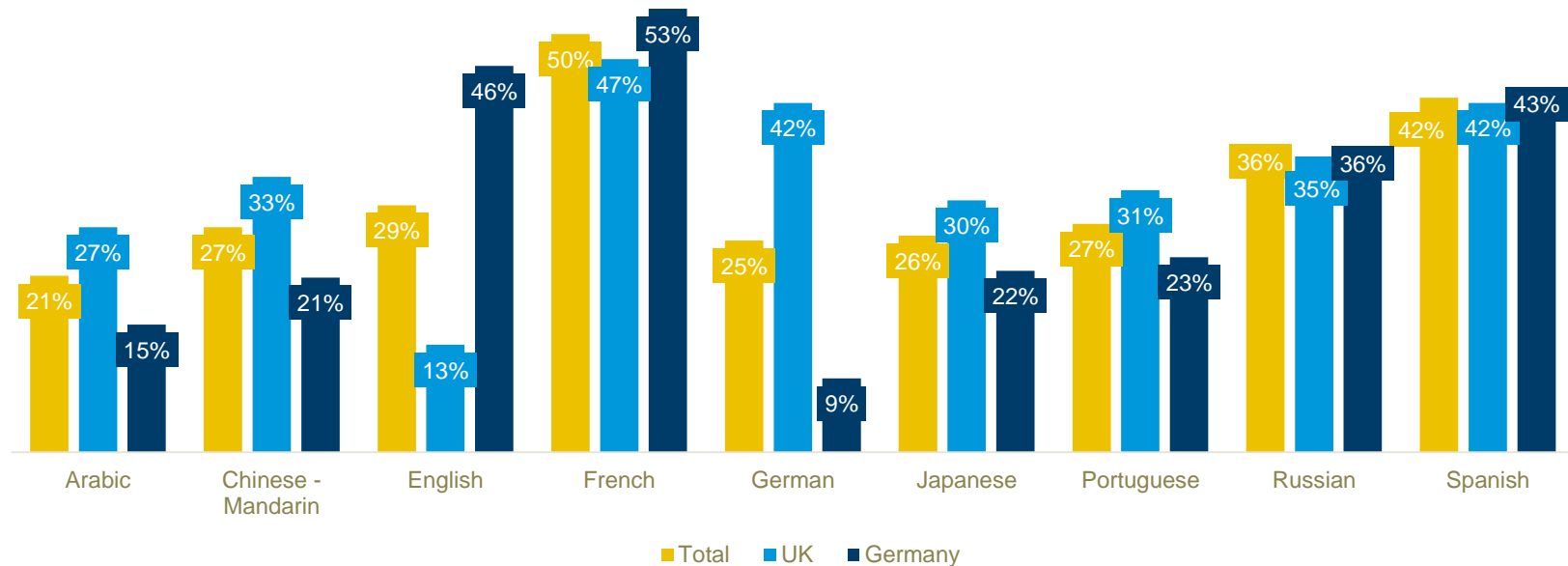


Figure 11: Languages used in respondents' organisation that also require improvement in employees' skills, asked to all (500 respondents), split by country

Employees need to improve their language abilities

Almost two thirds (63%) of respondents report that their employees need to improve their multi-lingual skills

Two thirds (65%) also report that their organisation's graduate employees need to improve their multi-lingual skills. This is just slightly fewer than report that their graduate employees need multi-lingual abilities at all (73%)

70% of respondents agree that language skills are not taught to sufficient standard for multi-national organisations. However, 73% report that they expect new employees to have better language skills in the future

This shows that while most respondents recognise that employees have been let down by schools, they will have high expectations for new employees

What sort of training do organisations provide for additional languages?

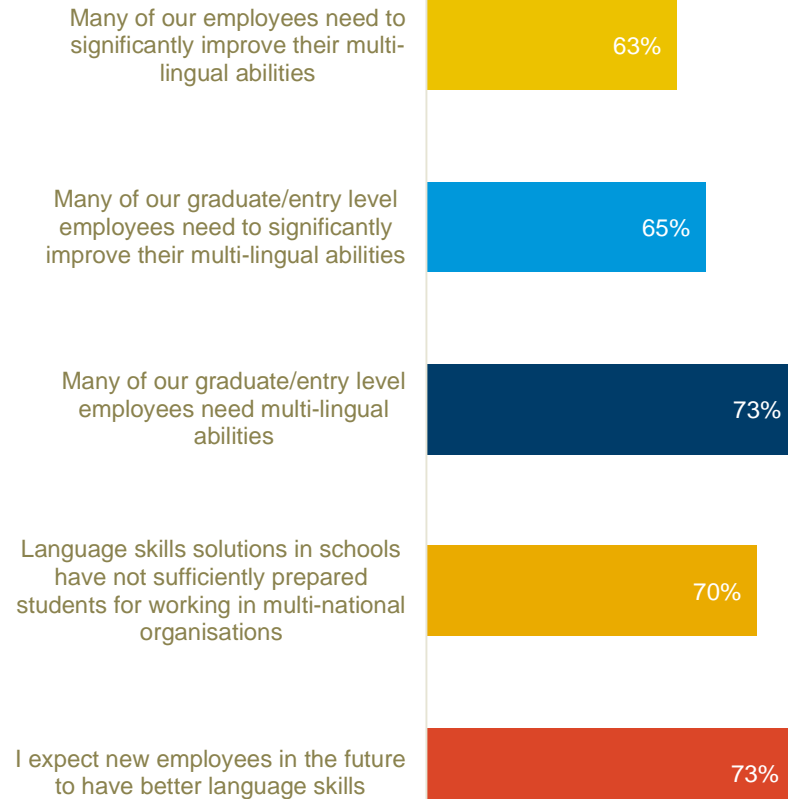


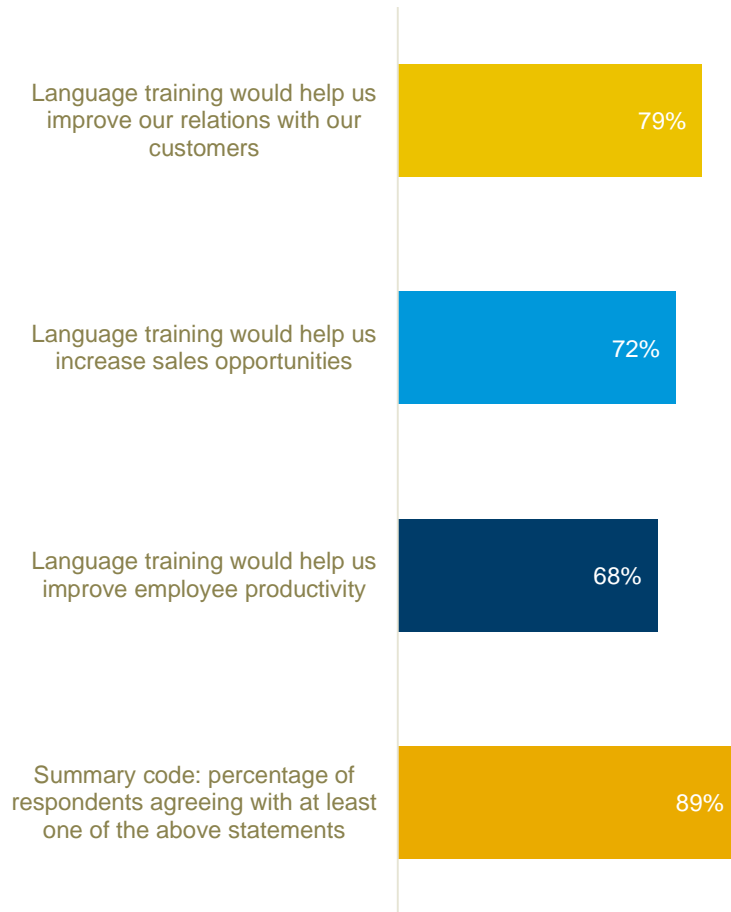
Figure 12: Percentage of respondents that agree with the above statements, asked to all (500 respondents)



Area 2

LANGUAGE TRAINING

Benefits of language training



The majority (89%) of respondents report that language training is useful

Almost eight in ten respondents (79%) report that language training would help their organisation improve relations with their customers. Around seven out of ten report that language training would also increase sales opportunities (72%) or improve employee productivity (68%)

Almost nine in ten respondents (89%) agree that language training would help their organisation in at least one of these three areas

This shows that the majority of respondents recognise how language training can have a direct financial benefit to their organisation

What level of lingual proficiency should employees have?

Figure 13: Percentage of respondents that agree with the above statements, asked to all (500 respondents)

Level of lingual proficiency

Respondents report that on average, 67% of staff require proficiency in another language to at least intermediate level

The average proportion of staff that require proficiency to each level are split almost evenly. This shows that organisations need to take account of the fact that language training requirements for employees are likely to vary

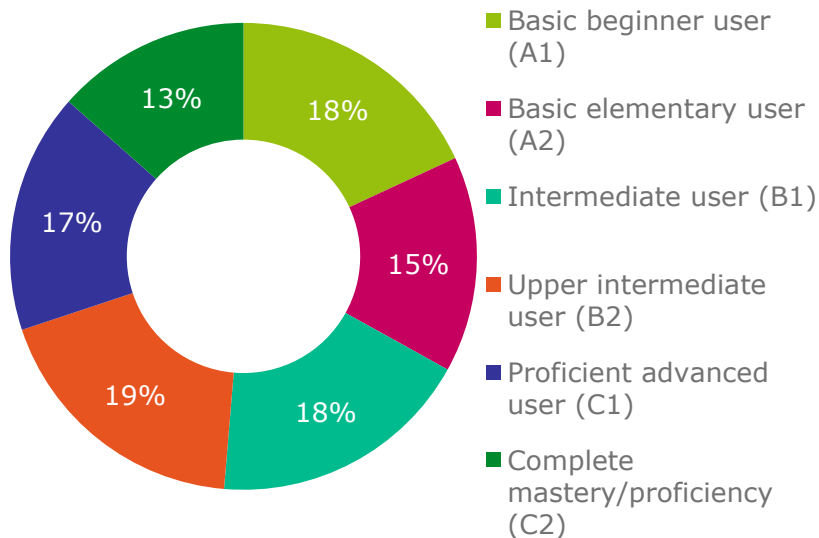


Figure 14: Average proportional split of staff within organisation that require proficiency in another language to a certain standards, asked to all who can estimate these proportions (449 respondents)

The proportion of staff who require proficiency in additional languages to at least intermediate level varies by sector

The business services, IT and financial sectors all require around three quarters of relevant staff to be trained to this level. This shows the extent to which any multi-lingual communications in these types of businesses are likely to be to a reasonably advanced level

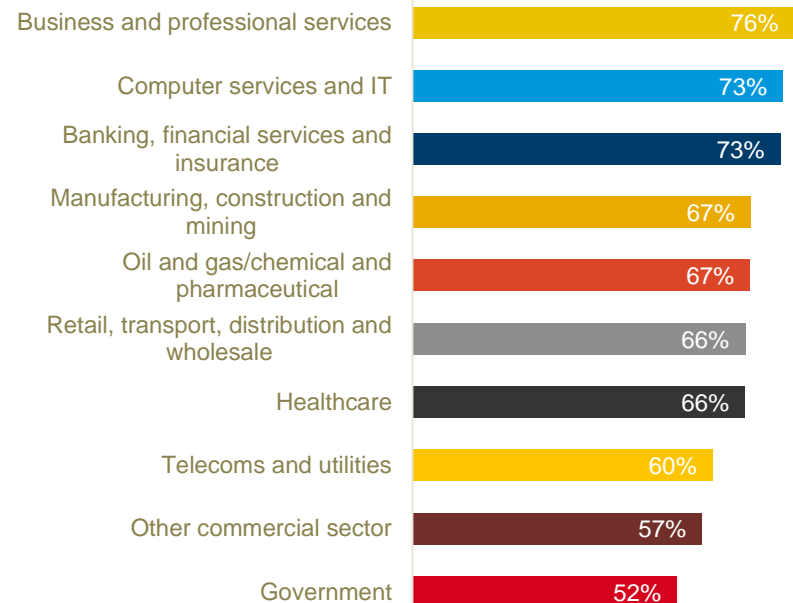


Figure 15: Average proportion of staff that require proficiency in another language to at least intermediate (B1) level, asked to all who are aware of how money spent on data is split between different types of information/data (454 respondents)

Requested language training

Face to face learning is overall the most likely training method to be reported as being requested for almost all levels of ability (by between 39% and 53%). Only for A1 level learning are respondents more likely to report that on the job training is requested more often (40% compared to 34% for face to face learning)

This shows that e-learning style training is unlikely to be requested by the majority of employees. As a result, in organisations where training methods are usually dictated by those employees that require them, e-learning is less likely to be used

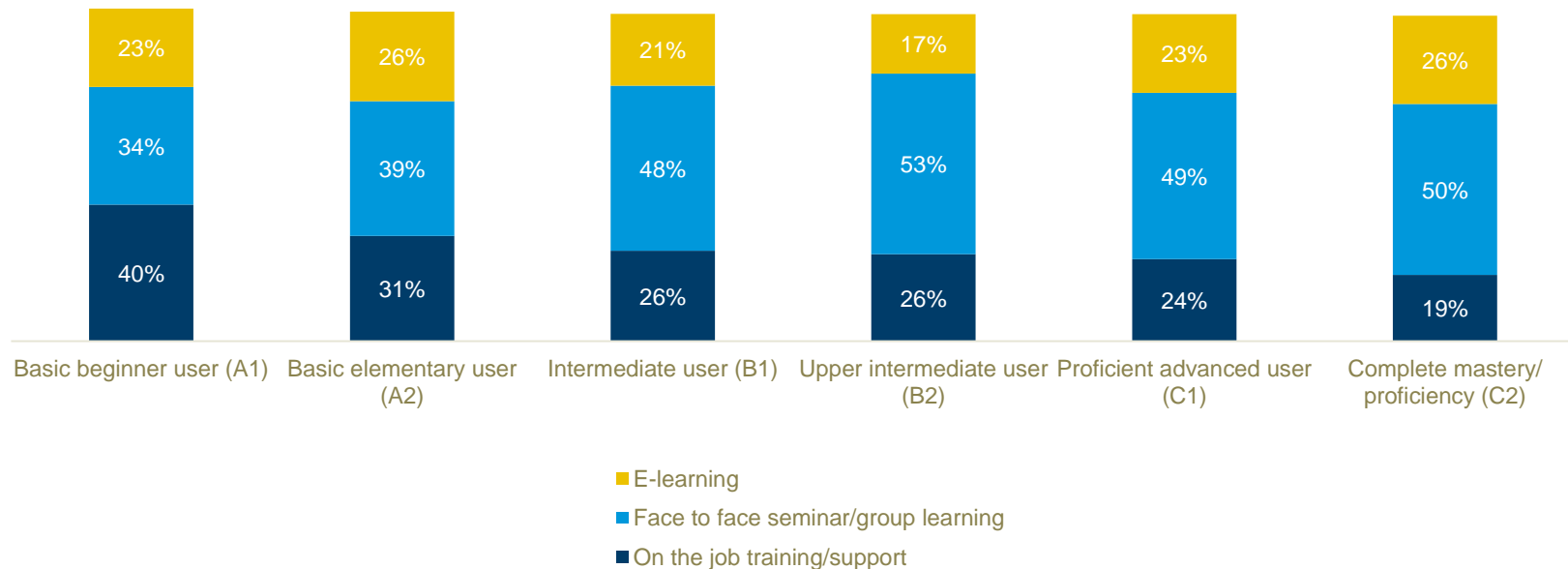


Figure 16: "And which one of the following types of training is most requested by your organisation's employees for learning or improving language skills?" asked to all (500 respondents)

The best way to train employees

Respondents are most likely to report that face to face learning is the best way to train employees to almost all language levels (by between 41% and 52% of respondents). The exception is for factory floor staff, where on the job training is most likely to be reported as the best method (by 40%)

Around one in five respondents (20-22%) say e-learning is the best way to train employees in language skills

This shows that while e-learning is seen as the best way of learning by a significant number, face to face learning is still the most likely to be regarded as best

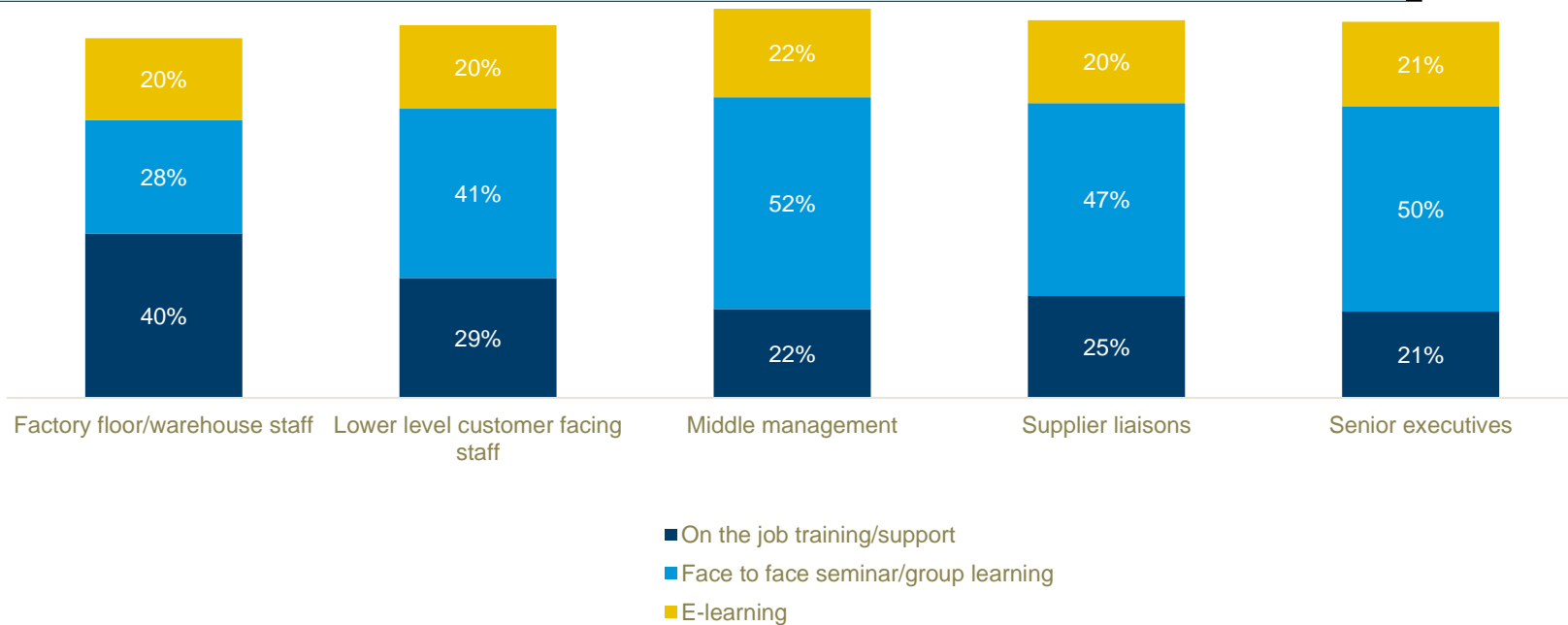


Figure 17: "Which one of the following do you believe to be the best way to train employees on language skills required for their job role?" asked to all (500 respondents)

Types of training provided by organisations

The majority of respondents report that each type of training is provided by their organisation.

59% say that e-learning training is provided, 66% say that face to face training is provided, and 67% say that on the job training is provided

However in each of these cases, around four in ten (39-41%) respondents also report that this training is not compulsory. In addition, around one in five (21-24%) respondents report that training is encouraged but not provided

This shows that in the majority of respondents' organisations, the value of language training is recognised, but responsibility for taking part in the training lies primarily with the employees

Do organisations experience any challenges of language training?

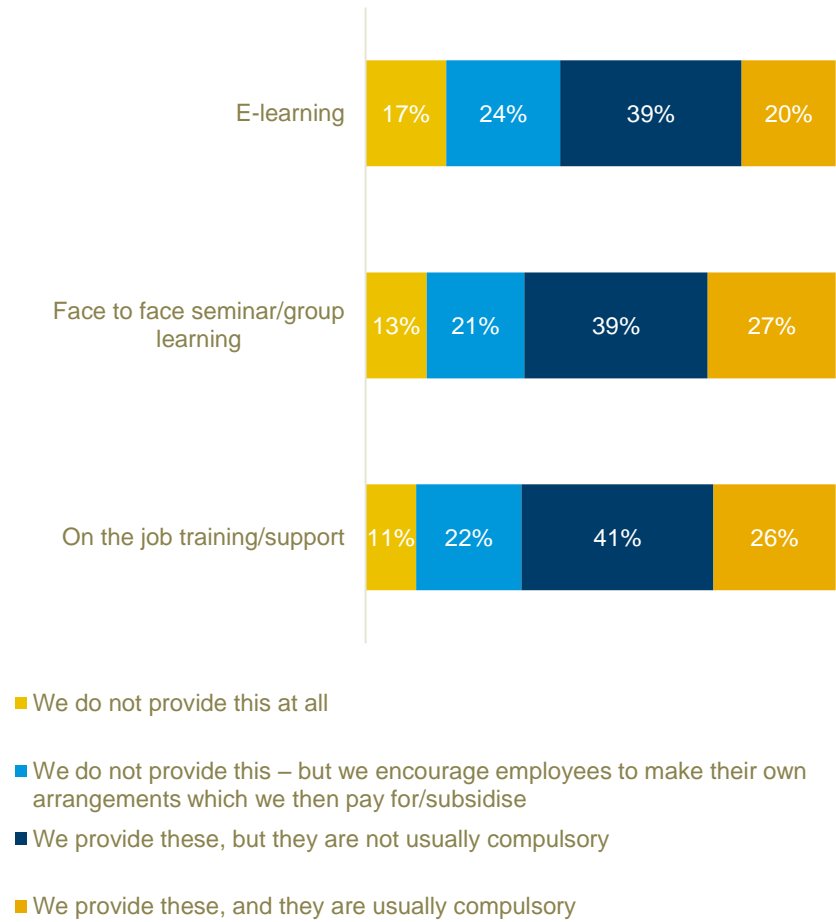
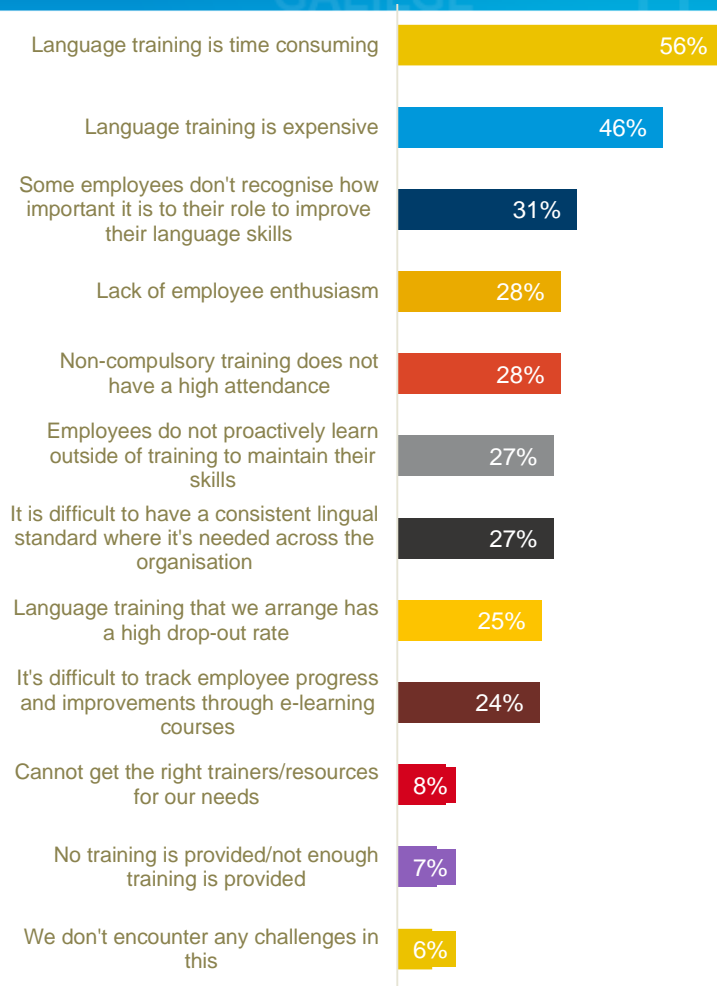


Figure 18: "How does your organisation ensure employees have the minimum required proficiency in additional required languages to carry out their role?" asked to all (500 respondents)

Perceived challenges of language training – respondents from the UK



94% of UK respondents say that they have encountered at least one challenge from language training

Over half (56%) of UK respondents report that language training is time consuming. This shows why around six out of ten respondents say that their organisation encourages training, but without enforcing their employees to be present

Almost half (46%) also report that language training is expensive. This shows that when employees do not take part in training, it can cost their organisation money if the training needs to be rescheduled as a result

This is further supported by the fact that 28% of respondents report non-compulsory training does not have a high attendance, and 25% that say this training has a high drop-out rate

Do respondents from Germany encounter different challenges?

Figure 19: "Which of the following challenges does your organisation encounter in making sure that employees are proficient in the additional languages required for their role?" asked to those in the UK (250 respondents)

Perceived challenges of language training – respondents from Germany

92% of respondents from Germany say that they have encountered at least one challenge from language training

Respondents from Germany are most likely to see language training as time consuming (48%), similarly to the UK respondents

However, respondents from Germany are more likely than UK respondents to say that it is difficult to have a consistent lingual standard across the organisation (42%)

This shows that the standard of language training is likely to vary within these respondents' organisations

How can e-learning help language training in organisations?

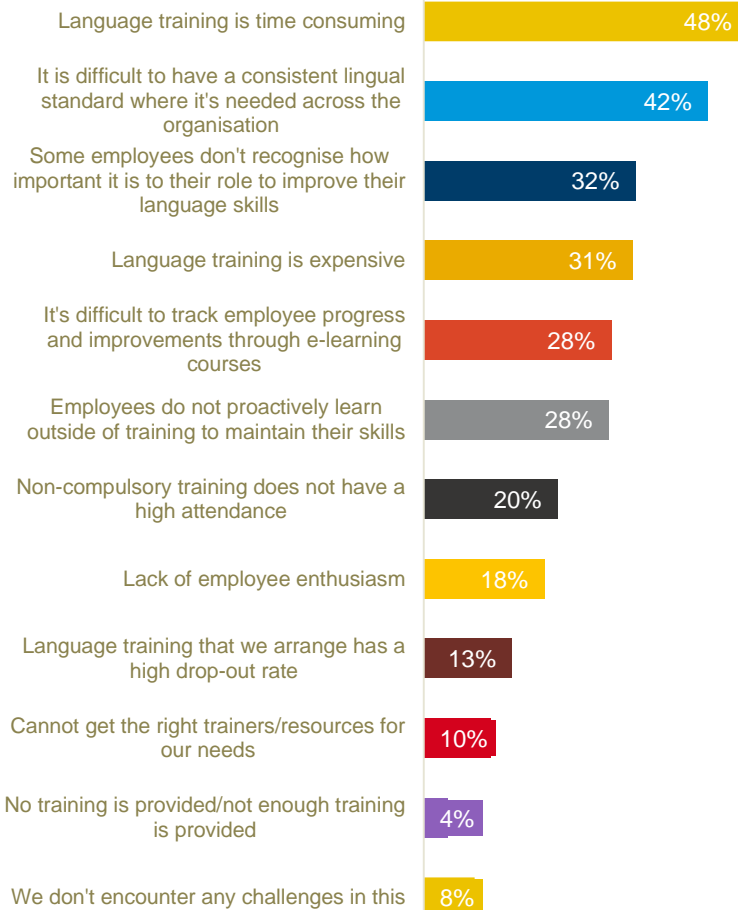


Figure 20: "Which of the following challenges does your organisation encounter in making sure that employees are proficient in the additional languages required for their role?" asked to those in Germany (250 respondents)



Area 3

E-LEARNING

Interest in e-learning platform

86% of respondents say that their organisation would be interested in an e-learning platform that could be used by all levels of language learners

Most respondents (73%) agree that there is a gap in the market for an e-learning platform that provides training for advanced language learners

This shows that respondents recognise the potential for this sort of platform

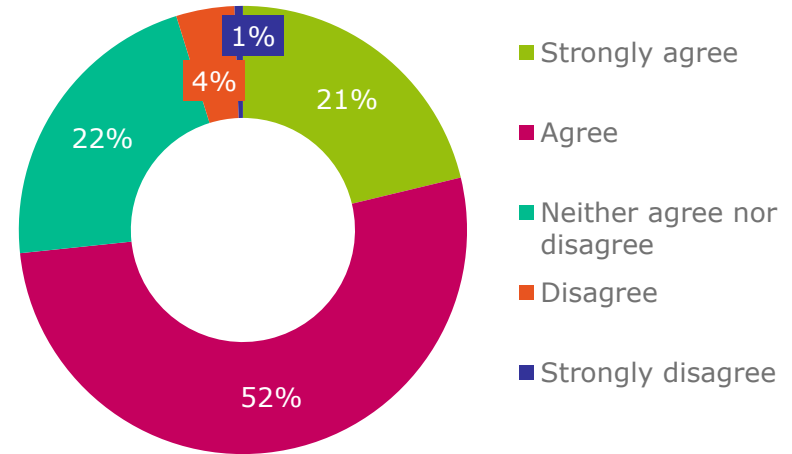
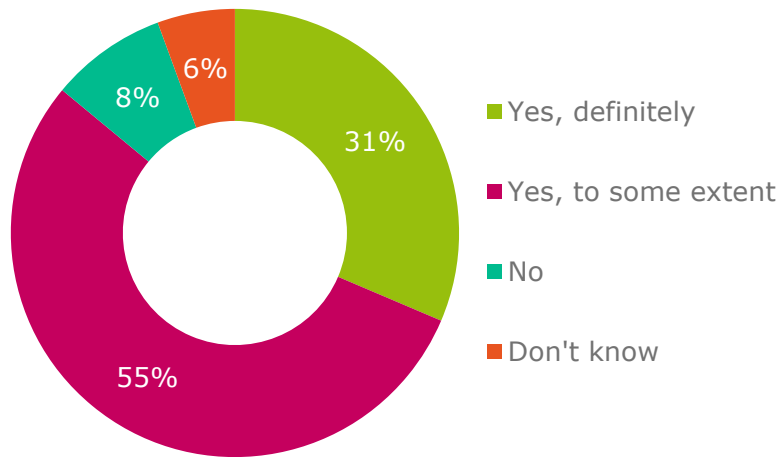
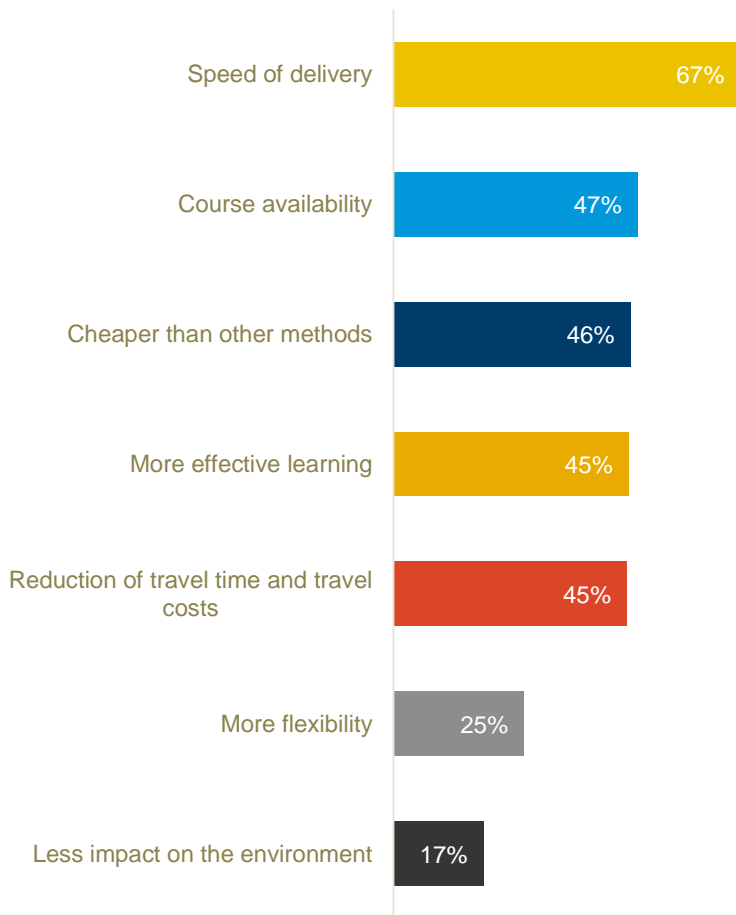


Figure 21: "Would an e-learning platform offering proficient language training to all levels of learner be of interest to your organisation?" asked to all (500 respondents)

Figure 22: Agreement with the statement "There is a gap in the market for an e-learning platform offering proficient language training skills to more advanced language learners." asked to all (500 respondents)

Reasons for using e-learning for languages



Two thirds (67%) of respondents report that their organisation uses e-learning because of the speed of delivery

Where organisations are finding language learning time consuming, and experiencing non-attendance to be an expensive result, the speed of e-learning can help overcome this

Almost half (46%) also say that e-learning is cheaper than other methods, which can help minimise the cost of non-attendance if it does continue to occur

What do all respondents, whether users or non-users, consider to be the advantages of e-learning?

Figure 23: "Why does your organisation use e-learning for languages?" asked to all respondents whose organisation uses e-learning as a tool to train employees in languages (293 respondents)

Advantages of e-learning for language training

94% of respondents report at least one advantage of using e-learning for language training

Almost six in ten (59%) respondents say that they consider lower costs to be an advantage, and around half (52%) also say that faster delivery is an advantage

Both these advantages can solve the two main problems with language training previously highlighted: the high costs involved and the time language training can take

Are there any organisations that are more likely to expect these advantages?

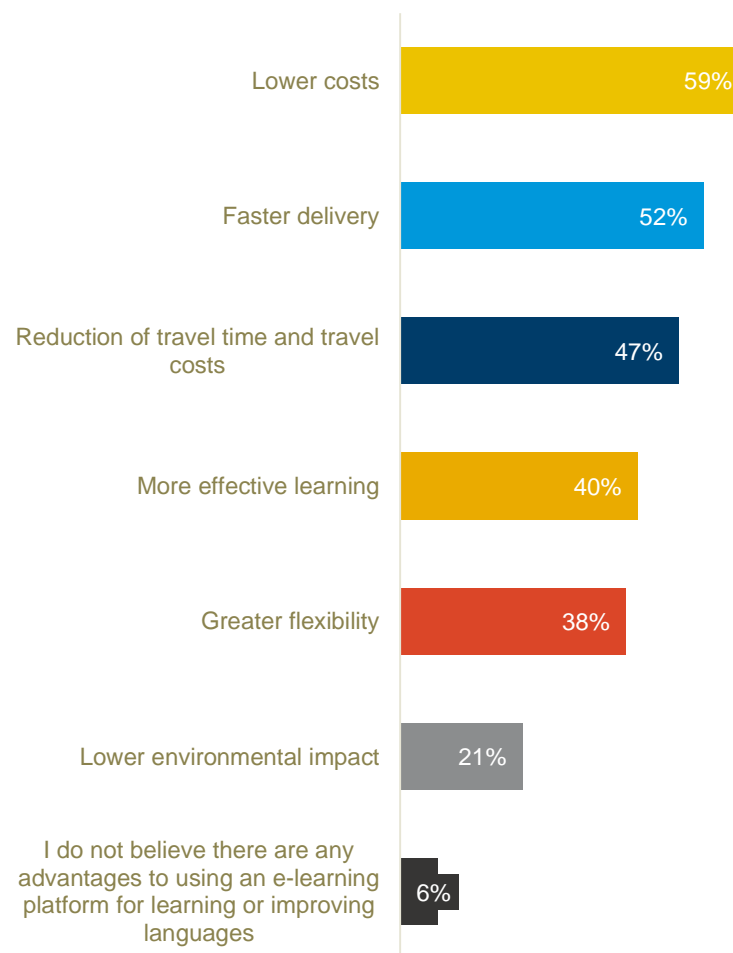


Figure 24: "Which of the following do you consider to be advantages of using an e-learning platform for learning or improving language skills?" asked to all (500 respondents)

Faster delivery and lower costs

Where respondents report that their organisation has more offices around the world in primarily non-English speaking countries, they are more likely to say that e-learning has a faster delivery than organisations with fewer offices (68% vs. 49%). This shows that respondents in more globally spread organisations are more likely to value a standard, consistent tool for e-learning

Regardless of how many offices a respondent's organisation has around the world, there is no significant difference in how likely they are to see lower costs as an advantage. This shows that the expectation of lower costs is not likely to be driven by how globally spread out an organisation is

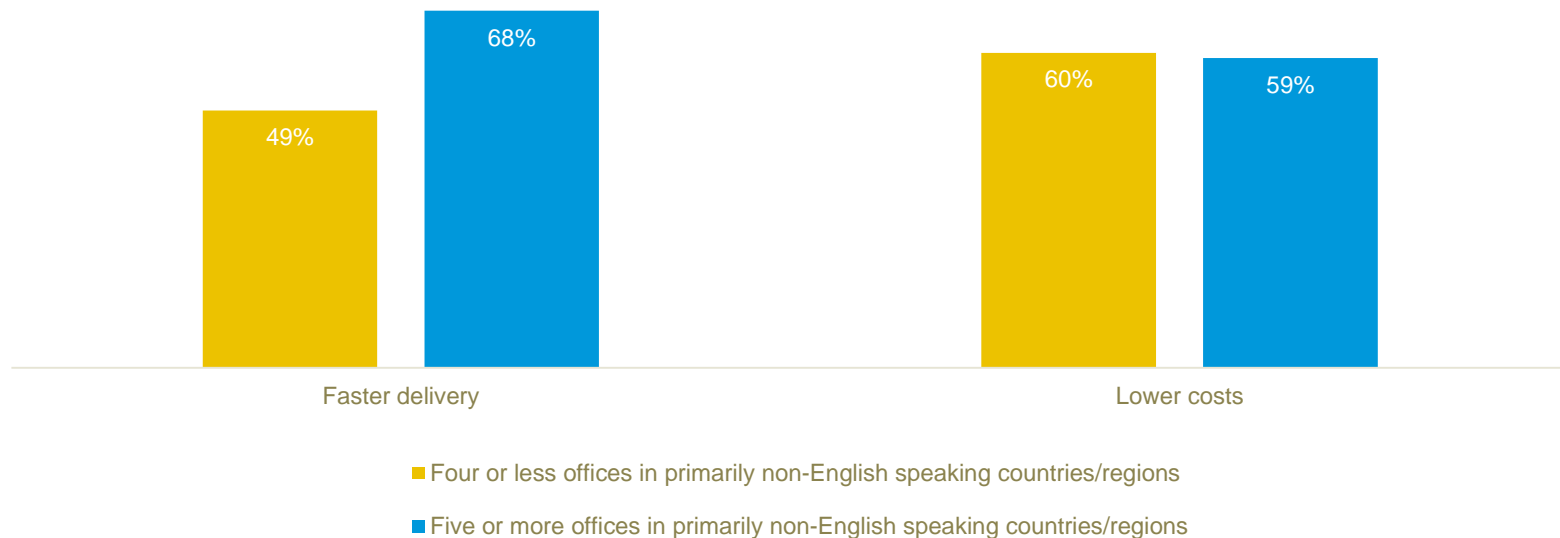


Figure 25: Top two most selected advantages of using an e-learning platform for learning or improving language skills asked to all (500 respondents), split by the number of non-primary English speaking locations organisation has offices in

The future of e-learning

Two thirds of respondents (66%) agree that the future of language training lies in e-learning
This shows that the advantages of e-learning are understood by the majority of respondents, even though relatively few report e-learning to be the most requested type of training

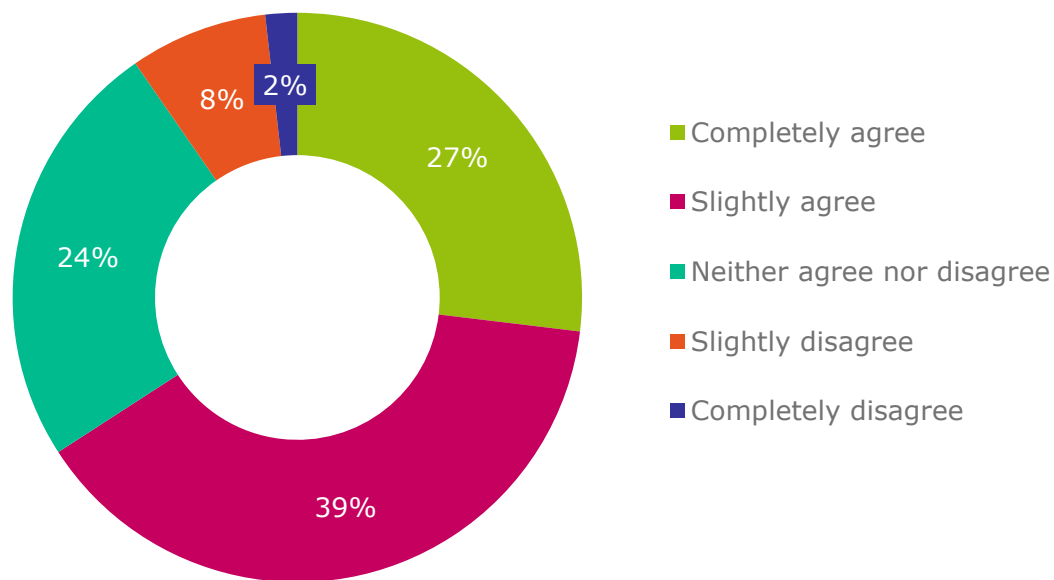


Figure 26: Agreement with the statement "The future of language training lies in e-learning" asked to all (800 respondents)

In summary... language in business

- The majority of respondents (79%) recognise the importance to their business of employee skill in additional languages
- A significant proportion of staff (19% on average), require knowledge of an additional language in order to carry out their role
- Even though use of additional languages within respondents' organisations is extensive, many note that the skills of employees in these languages need to be improved
 - 50% report that the use of French in their organisation needs to improve
 - 42% report that the use of Spanish in their organisation needs to improve
- The level of skill that staff require in additional languages varies, and is almost equally split between three broad levels of ability (33% basic, 37% intermediate, 30% expert)

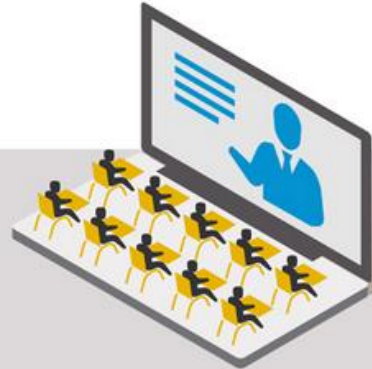
In summary... e-learning

- E-learning, face to face, and on the job training are all used in the majority of organisations (at least eight in ten depending upon the training method) for language training. But usually this training is non-compulsory for staff (around six in ten depending upon the training method)
- The main challenges faced currently in language training are how long the training takes (52%) and how costly the training is (38%)
- The main advantages of e-learning are how fast the training is (52%) and that the costs are lower (59%)

Infografik: Bedeutung der Ergebnisse

Rosetta Stone Business

Der digitale Sprachlehrer



Zur Infografik



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