

The Strange Case of the Transfer of Training Estimate

Robert Fitzpatrick
Cranberry Township, Pennsylvania

Some time ago, a learning systems product development manager named David L. Georgenson set about to write an article on transfer of training, with emphasis on ways in which it might best be nurtured in organizations. To introduce his discussion, Georgenson hit upon the idea of asking a rhetorical question, thus: "How many times have you heard training directors say: 'I...would estimate that only 10% of content which is presented in the classroom is reflected in behavioral change on the job'" (Georgenson, 1982, p.75). Georgenson had no need to, and did not, cite any evidence or authority for the 10% estimate; it is clear that he had used a rhetorical device to catch the reader's attention. The estimate may or may not be accurate; it seems plausible but not compellingly so.

Georgenson's article contains nothing about the dollar cost of training. There is no reason that Georgenson should have dealt with cost, and he did not.

In time, other authors wanted to write on transfer and to find some introductory way to convince the reader that transfer is indeed a problem worth writing about. And so were spawned a number of articles and books which used the estimate of Georgenson's fictive training directors. Here are some examples in which Georgenson (1982) was specifically cited as the source:

"It is also estimated that only 10% of the dollars spent on training results in actual behavioral change back on trainees' jobs" (Wexley & Baldwin, 1986, p. 503).

"It is estimated that while American industries annually spend up to \$100 billion on training and development, not more than 10% of these expenditures actually result in transfer to the job" (Baldwin & Ford, 1988, p. 63).

"Less than 10% of [estimated expenditures on staff development] may produce behavioral changes on the job" (Alavi, 1994, p. 160).

"Georgenson (1981) [*sic*] estimated that not more than 10% of the \$100 billion spent by industry actually made a difference to what happens in the workplace!" (Dickson & Bamford, 1995, p. 91)

"...given the finding that only 10% of training expenditures have been shown to result in behavioral changes back on the job" (Facteau, Dobbins, Russell, Ladd, & Kudisch, 1995, p. 2).

And there is more. Some writers on transfer did not cite Georgenson but did cite others who cited Georgenson. For instance:

"A recent comprehensive survey of research and literature by **Timothy Baldwin** and **Kevin Ford** found the following:... It is estimated that while American industries annually spend up to \$100 billion on training and development, not more than 10% of these expenditures actually result in transfer to the job...(1988, p. 63)." (Broad & Newstrom, 1992, p. 7)

"Timothy Baldwin and Kevin Ford (1988, p. 63) report: 'Not more than 10% of these expenditures [on training] actually result in transfer to the job.'" (Robinson & Robinson, 1995, p. 3) See also Fitzpatrick (1996).

In most of these examples, the 10% figure is accurately identified as an estimate, though words such as “finding” and “report” do appear. But almost all refer to \$100 billion, though Georgenson’s imaginary training directors said nothing about expenditures. If they had, one supposes they would have made some adjustment for inflation over the years.

All the writings cited here so far come from 1996 or earlier. I found most of them through the *Social Science Citation Index*. Soon, the search process became burdensome and the returns seemed to be diminishing. I put the information aside, with the thought that, like the black plague of long ago, the epidemic of transfer estimates had run its course.

But recently I caught up with the April 2001 issue of the *Journal of Applied Psychology*. There, in the introductory paragraph of an otherwise enlightening article, it says: “U.S. businesses spend upwards of \$100 billion annually on formal and informal training activities (Georgenson, 1982). However, it is estimated that only 10% of these training expenditures result in transfer of training to the job (Georgenson, 1982).” (Smith-Jentsch, Salas, & Brannick, 2001, p.279)

So the plague is back. Or perhaps it never went away. Some will say it doesn’t matter. It’s only introductory fluff, not centrally germane to the main thrust of the topic which it introduces.

But others may argue that it does matter. If we can’t trust the introductory citations, how can we then accept the more weighty citations and ideas which follow? And sometimes the introductory matter is important in itself; if Georgenson had said that only 90% of what is taught is transferred to the job, isn’t it less likely that we would have read his article (or funded his study of transfer) in the first place?

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