



Computer Education Management Association
Europe

CEdMA Worldwide Training Market Barometer 2nd Quarter 2020

Introduction

This report is compiled by CEdMA for its members about their Education businesses. It is based around a series of absolute growth or decline percentages in the range +/- 12.5%. Revenue and volumes refer to training services delivered in the quarter and not future bookings. Members provide their data from the global business and/or EMEA. Note that in this report, u/f/d is the number of members reporting up/flat/down, respectively.

We now only show history since 16q1 in this report as well as commentary on most recent trends. Both worldwide and EMEA output is shown together for comparison.

However, if you wish to see the longitudinal charts without commentary but which show Worldwide and EMEA since 2011, please use this [link](#).

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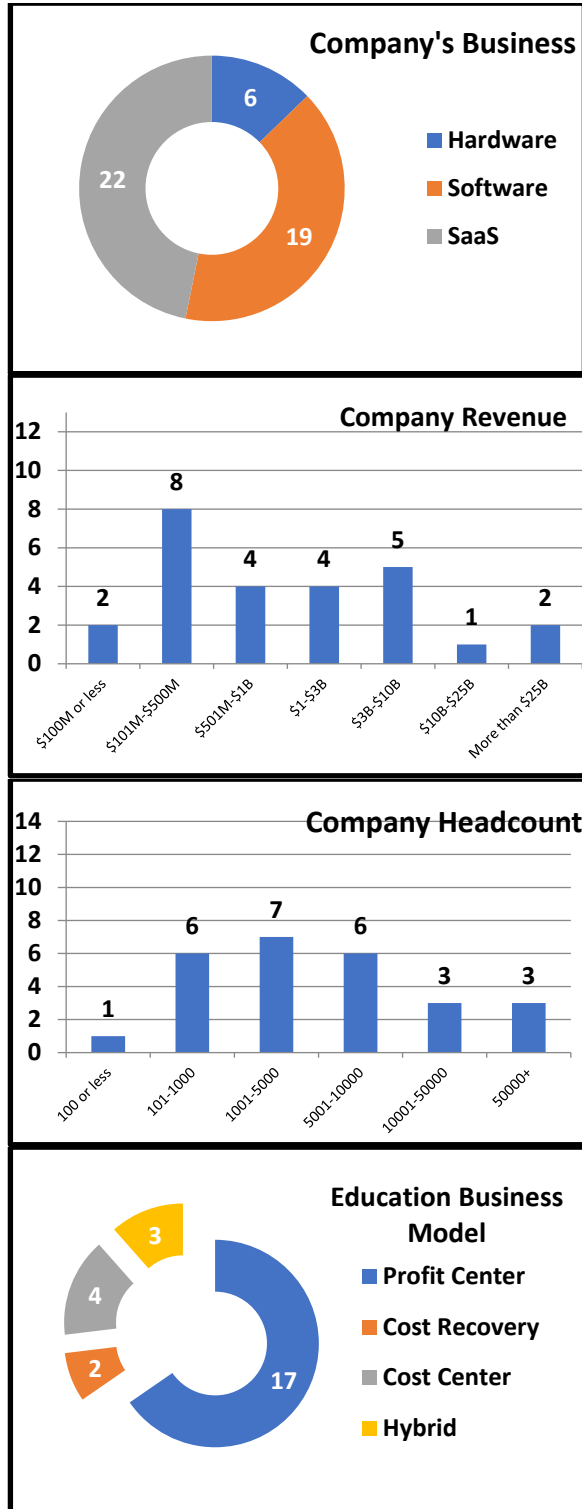
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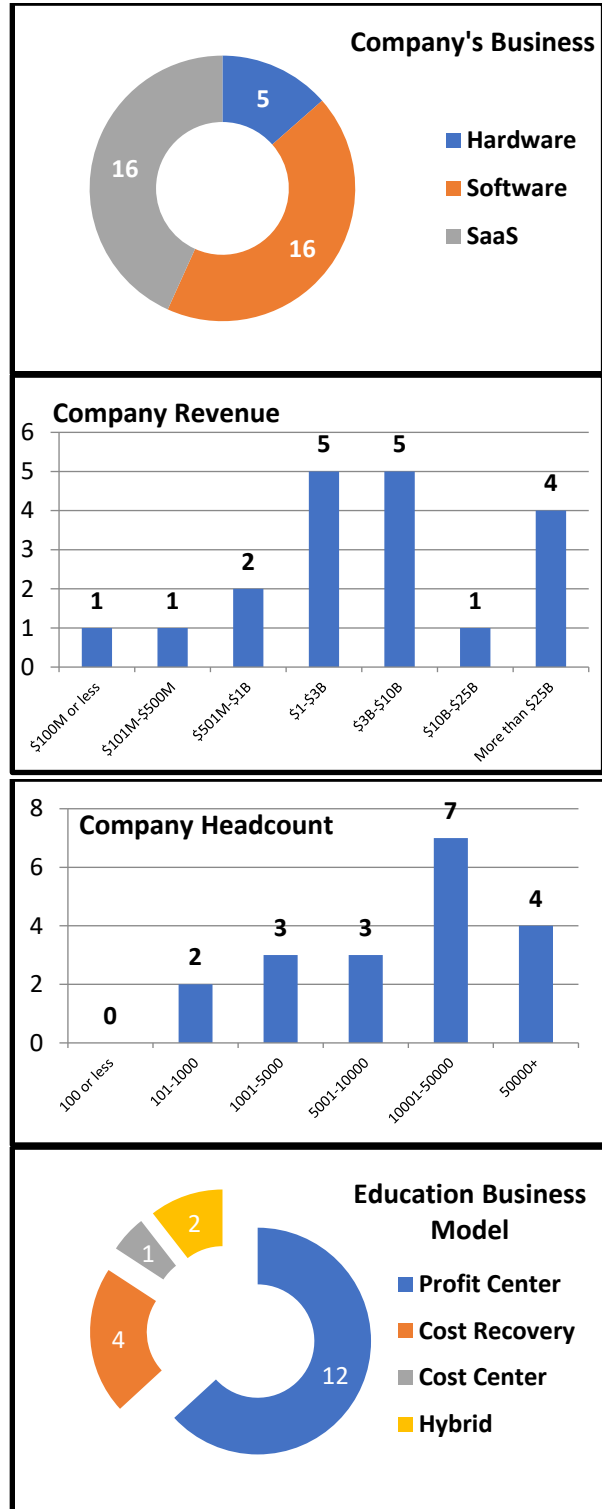
Member Profiles

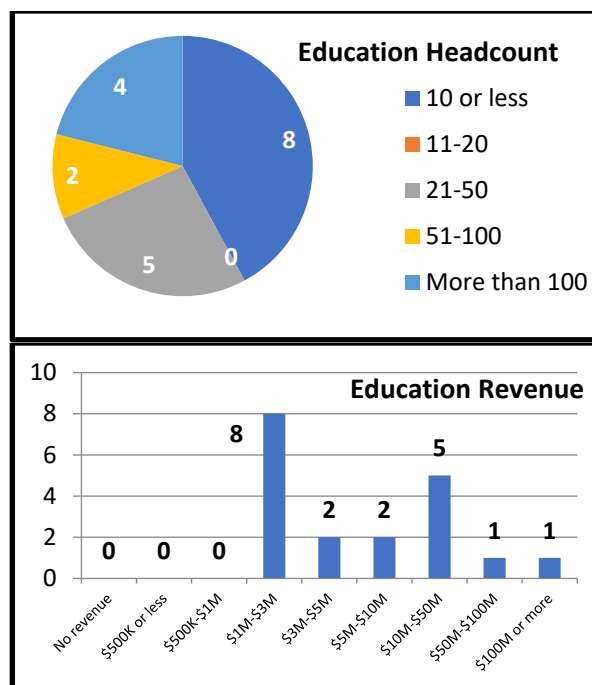
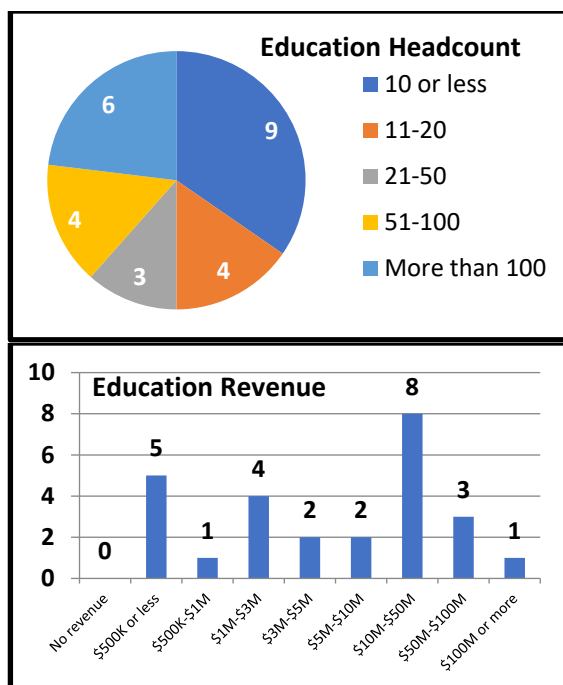
Sample size for 20q2 was 26 for Worldwide and 19 for EMEA.

Worldwide



EMEA





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Summary

The unweighted average uses all responses as entered, whereas the weighted average uses the size of the revenue, taking the relevant education revenue value, so larger companies have a bigger impact.

Growth observations are weighted and based on trendlines of 4-period moving averages.

Total Revenue is defined as all recognized revenue.

WW: The trend was 4-5% in 2016, dropped to 2-3% in 2017 and is now negative 2% through 20q2.

EMEA: Having been down to negative 2% in 2014, the trend recovered to positive 3% increase in 2016 and 4% in 2019 but is now back to positive 1% to 20q2.

Operating Profit is revenue minus all fixed and variable costs, excluding allocations, divided by revenue.

WW: The growth trend is just below flat through 20q2, down from 4% in 2016, and 3% in 2018.

EMEA: The trend has recovered from a low of negative 2% during 2013 to a 3% increase in 2017-18, a 2% increase in 2019 but is now down to just above flat to 20q2.

Live Classroom (ILT) is all revenue when the instructor is in the same physical location.

WW: Growth was flat in 2013-14, 2% in 2015-17, negative 7% through 20q1. None occurred in 20q2.

EMEA: It fell to negative 2% during 2014, recovered to flat in 2015, showed a 2% decrease in 2017, was flat in 2017-18 but fell to negative 5-6% to 20q1. None occurred in 20q2.

Virtual Classroom (VILT) is all revenue for instructor-led training via the web, including virtual labs.

WW: Growth has dropped from 6% in 2015-16, to 3% in 2017, dipped to negative 2% in 2019 but is now showing a 2% growth, probably in the absence of live training.

EMEA: The trend dropped from 6% during 2013 to 1% in 2014-15 but has risen steadily to 9% to 20q2 in

the absence of live training.

Public (scheduled) classes is revenue for ILT and VILT.

WW: The trend has dropped to negative 3% through 20q2, having peaked at 1-2% in 2014, and been flat in 2015-16, but negative since 2017, now negative 4%.

EMEA: The trendline was negative 3% in 2019 which has continued through 20q2.

Private (one-customer) classes is revenue for ILT and VILT.

WW: It's now showing a trend of negative 7% to 20q2, having been 2% in 2015 and 4-5% in 2016-17.

EMEA: The trendline was showing 4% in 2016, 5% in 2018-19 but now is negative 5% through 20q2.

Self-paced is all revenue generated by training students without instructors, such as eLearning, video, and can be paid per use or by subscription.

WW: It's showing a 9% increase through 20q2, having grown steadily from a 5% increase in 2013 and 11% in 2019. A lot of free self-paced was given once live ILT was withdrawn.

EMEA: After climbing to 11% increase in 2019, it's dropped back to 7% increase year on year in 20q2 but was as low as negative 4% during 2013-14. A lot of free self-paced was given in 20q2.

Certification is all revenue for certification business, such as exam fees and exam prep services, but excluding any exam prep training which is accounted under ILT/VILT/self-paced.

WW: The trendline has climbed back to 5% through 20q2, falling from 5% in 2015, but flat since then.

The pandemic disruption has pushed many customers back to certification.

EMEA: The trend is up to 3% to 20q2, with more customers seeking certification.

Learning Consulting is all revenue generated by non-training education business like learning needs analysis, customization of material assessments, and mentoring/coaching after training.

WW: While the trend was flat for 2016, it dipped to negative 4% in 2018 but is now showing negative 3% through 20q2.

EMEA: The increase was 3% in 2018 but slipped to flat in 2019 but now is up to 3% again.

Learning Technologies is all revenue generated by learning tools, infrastructure, courseware and directly related training and learning consulting for these technologies.

WW: The trendline through 20q2 is showing 6%, having been as low as negative 6% for 2018 but the data is swayed by large members' reporting with only five inputs.

EMEA: This is very similar with a 4% increase in 2017 down to flat in 2018 but up to 6% through 20q2. Again, with only three large members reporting revenue, this is unreliable.

New Learning Modalities is all revenue for social learning, gamification, microlearning, mobile.

WW: 2018 showed the trendline at 5%, but it's now negative 3% through 20q2, with only four inputs.

EMEA: The trend over the last 10 quarters has remained around 1%. There were five inputs in 20q2.

Subscriptions include all revenue from any of the above modalities included in subscriptions.

WW: Subscription revenue has grown consistently 7% from 2017 and it's now 8% in through 20q2. 17 reported revenue.

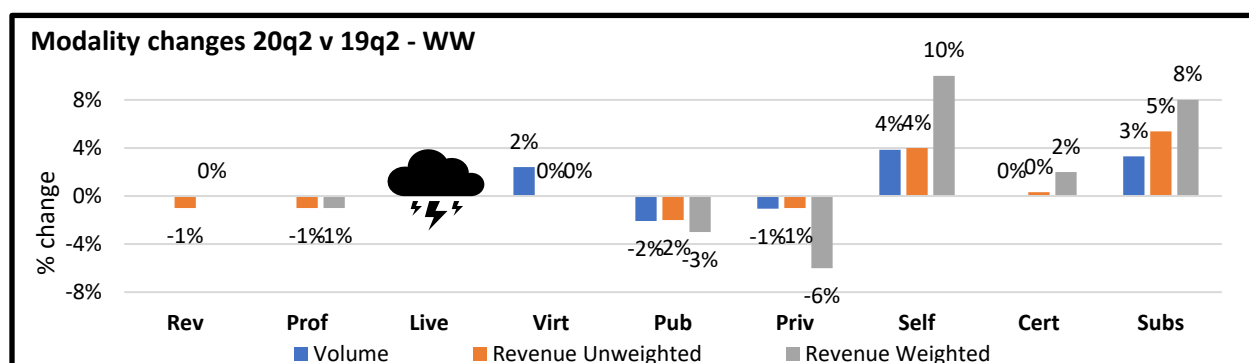
EMEA: With many companies starting in 2015/16, the increase was 8% over 2016, rising to 11% in 2019, but has fallen back to 8%. 11 reported revenue.

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Volumes as well as revenue

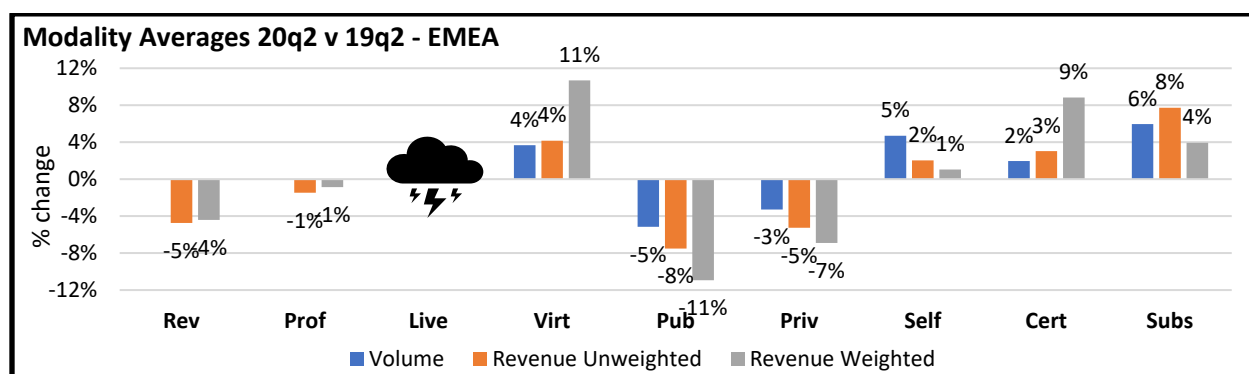
We now ask for percentage movement of modalities by volume of students in addition to or instead of revenue. Of course, volume averages will only be for unweighted input. Here's the comparison for 20q2.

WW	Rev	Prof	Live	Virtual	Pub	Private	Self	Cert	Subs
Volume				2%	-2%	-1%	4%	0%	3%
Revenue Unweighted	-1%	-1%		0%	-2%	-1%	4%	0%	5%
Revenue Weighted	0%	-1%		0%	-3%	-6%	10%	2%	8%



The significant revenue increases for 20q2 compared to 19q2 are self-paced and subscriptions. Live instructor-led simply did not happen, affecting the decreases in public and private.

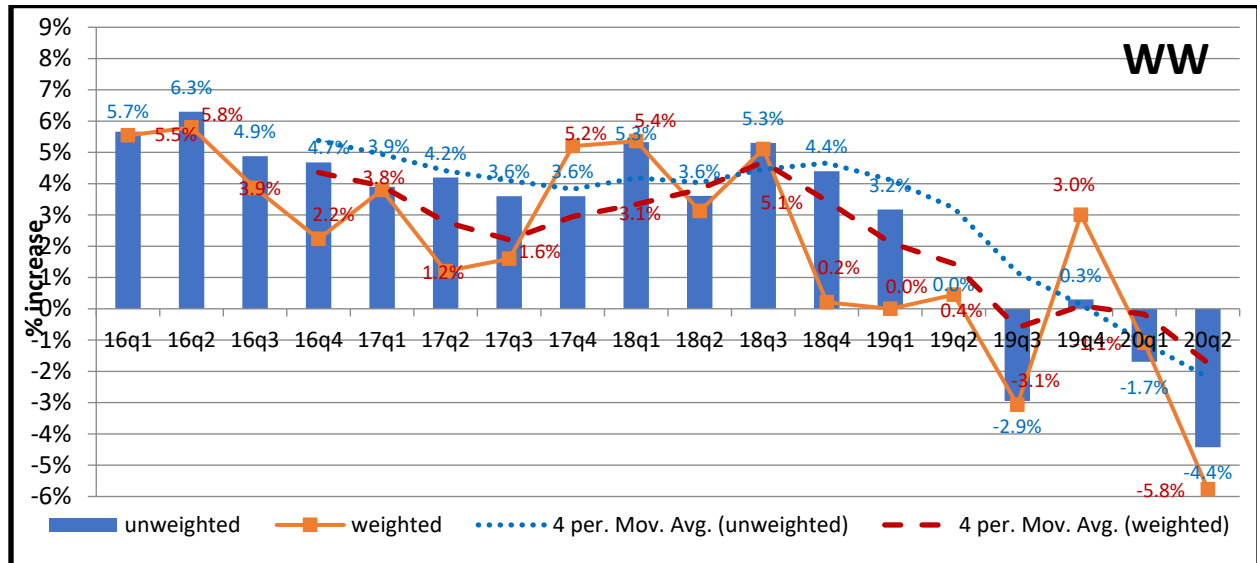
EMEA	Rev	Prof	Live	Virtual	Pub	Private	Self	Cert	Subs
Volume				4%	-5%	-3%	5%	2%	6%
Revenue Unweighted	-5%	-1%		4%	-8%	-5%	2%	3%	8%
Revenue Weighted	-4%	-1%		11%	-11%	-7%	1%	9%	4%



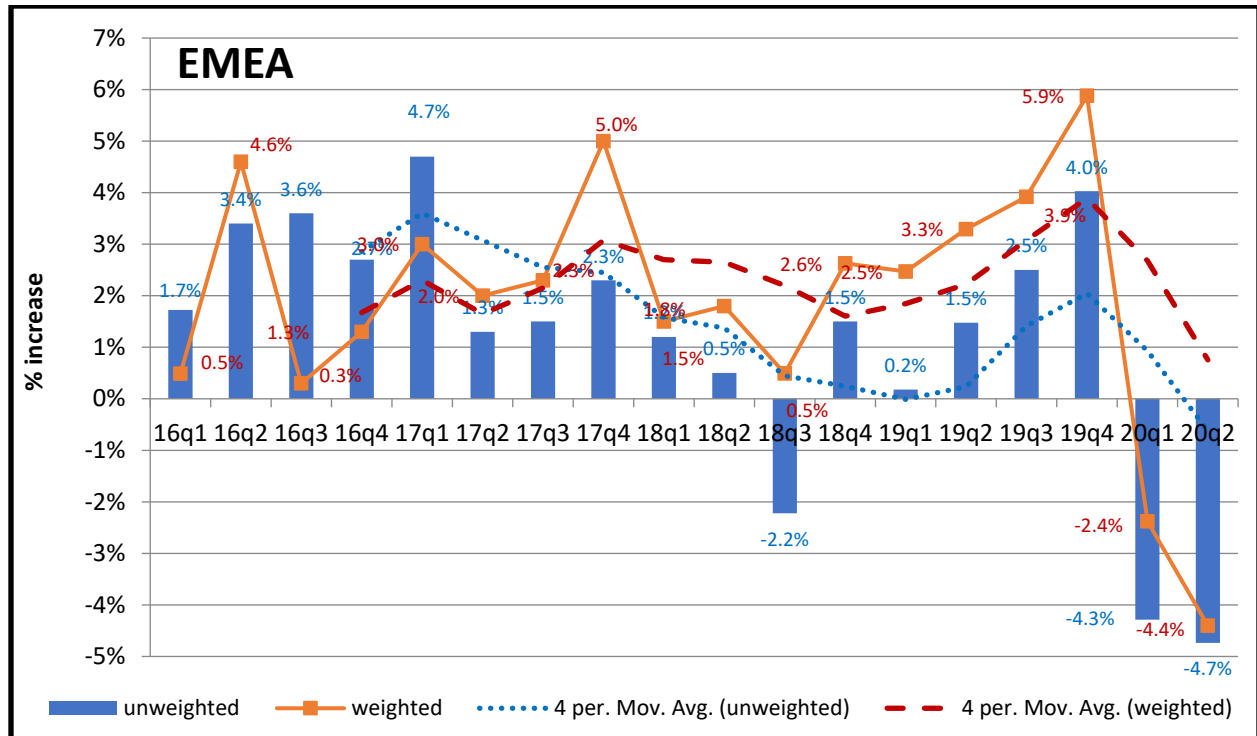
The significant revenue increases for 20q2 compared to 19q2 are virtual instructor-led, certification and subscriptions. Live instructor-led simply did not happen, affecting the decreases in public and private.

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Overall Training Revenue



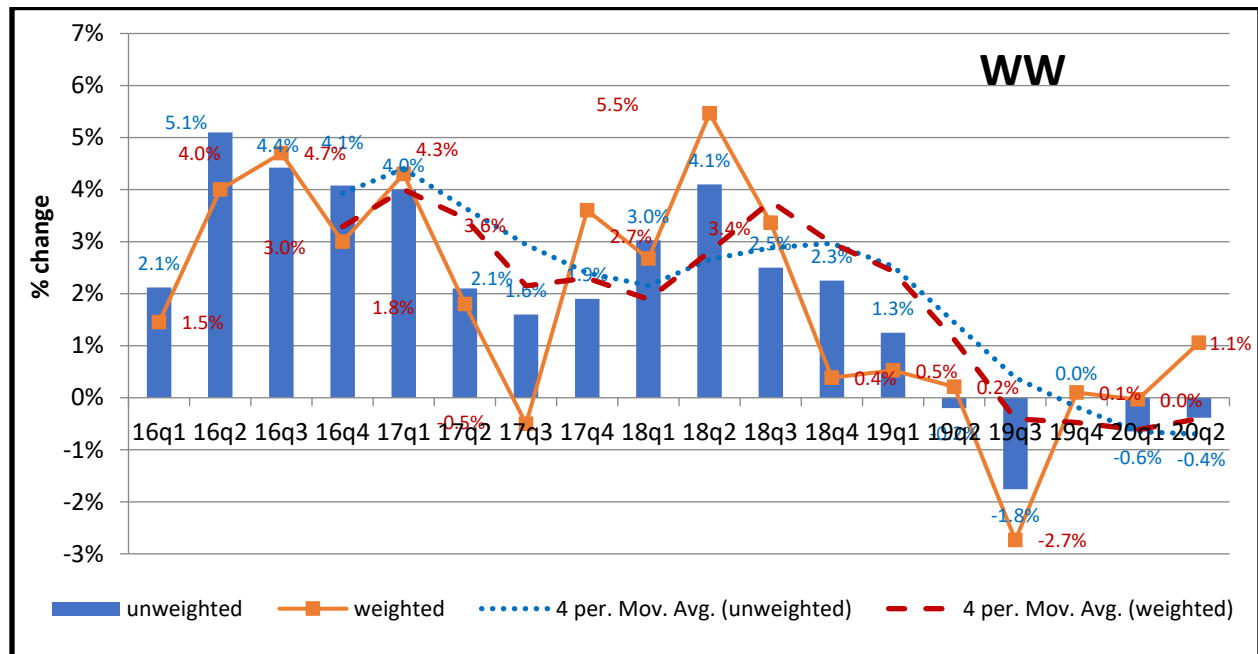
The unweighted total training **revenue** decrease for 20q2 (u=8, f=2, d=16) was -4.4%. The weighted total training **revenue** decrease was -5.8%. The 4-period moving average is currently showing -2% for both unweighted and weighted.



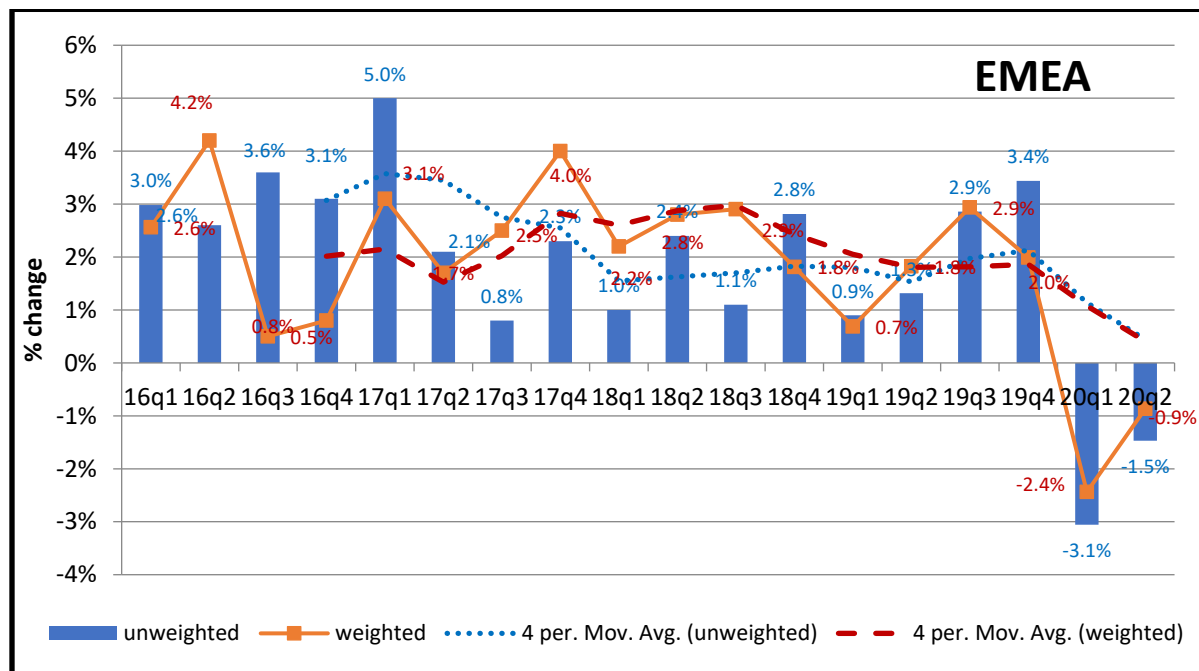
The unweighted total training **revenue** decrease was -4.7% in 20q2 (u=6, f=1, d=15). When considering the weighted numbers, it was -4.4%. However, the weighted trendline still shows an increase of 1% over the last four quarters when size of company is considered.

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Training Profit



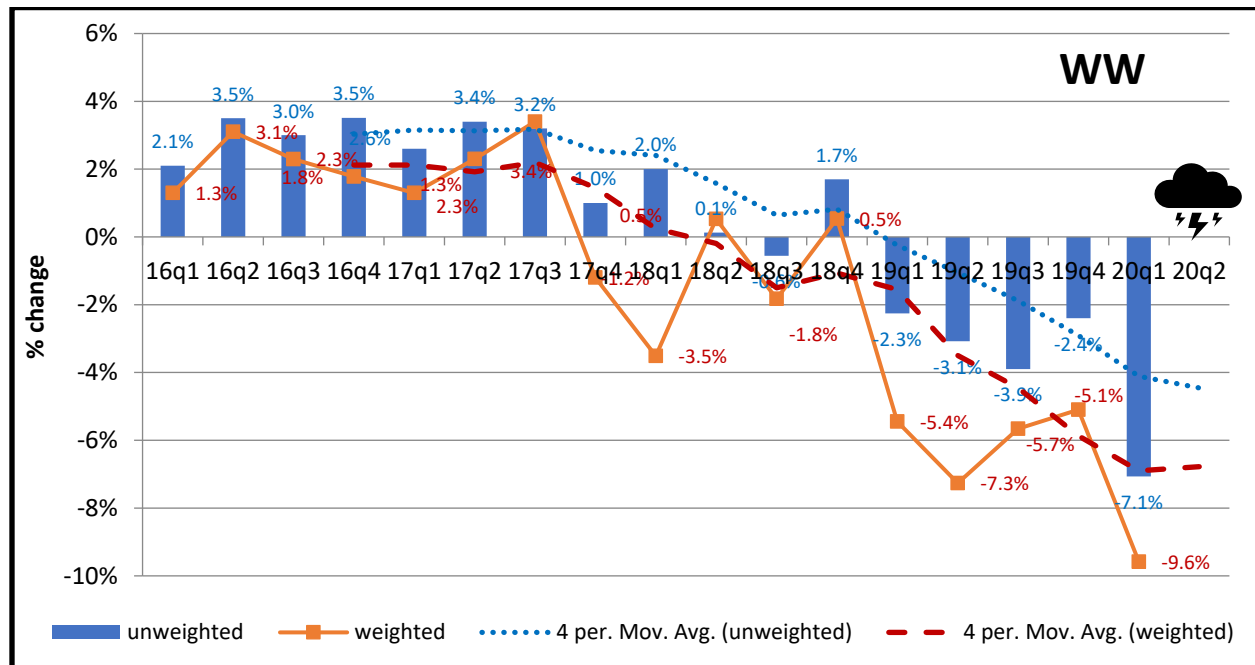
Training profit in 20q2 (u=10, f=4, d=12) decreased -0.4% for unweighted but increased 1.1% for weighted. The training profit weighted trendline to 20q2 is flat.



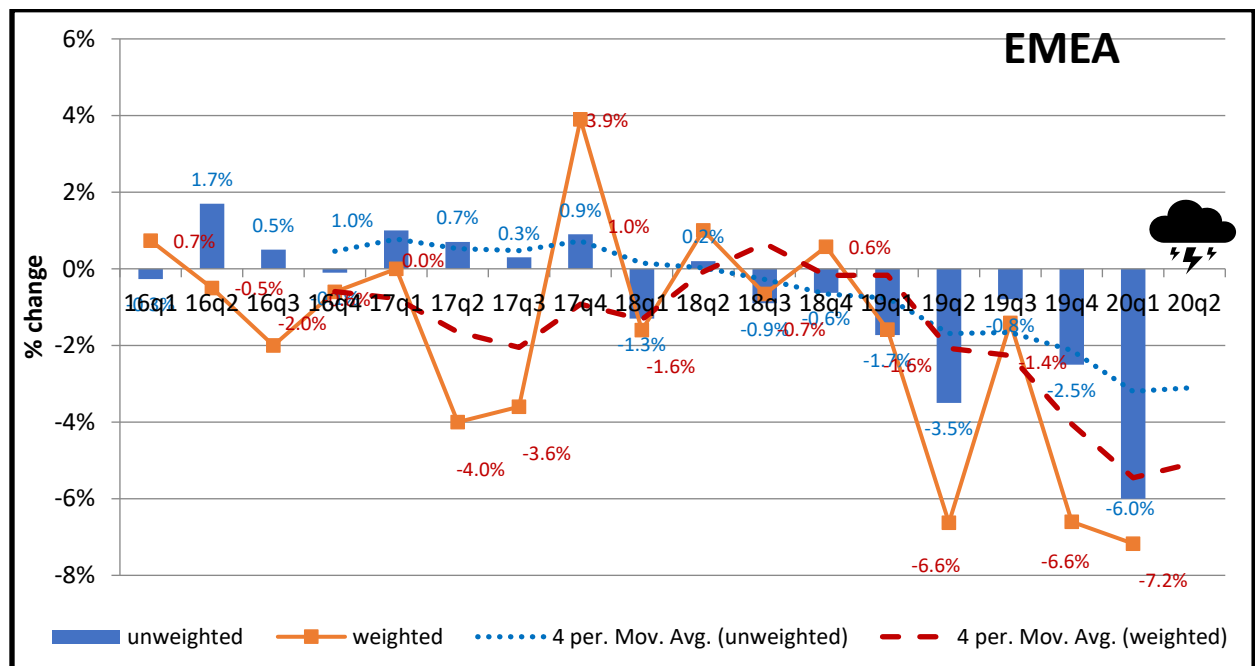
The unweighted total training profit fell -1.5% in 20q2 (u=6, f=3, d=8). And, with the weighted numbers, there was also a decrease of 0.9%. The weighted trendline shows an ongoing profit increase of just over flat for the last four quarters when size of company is considered.

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Live Instructor-led Training



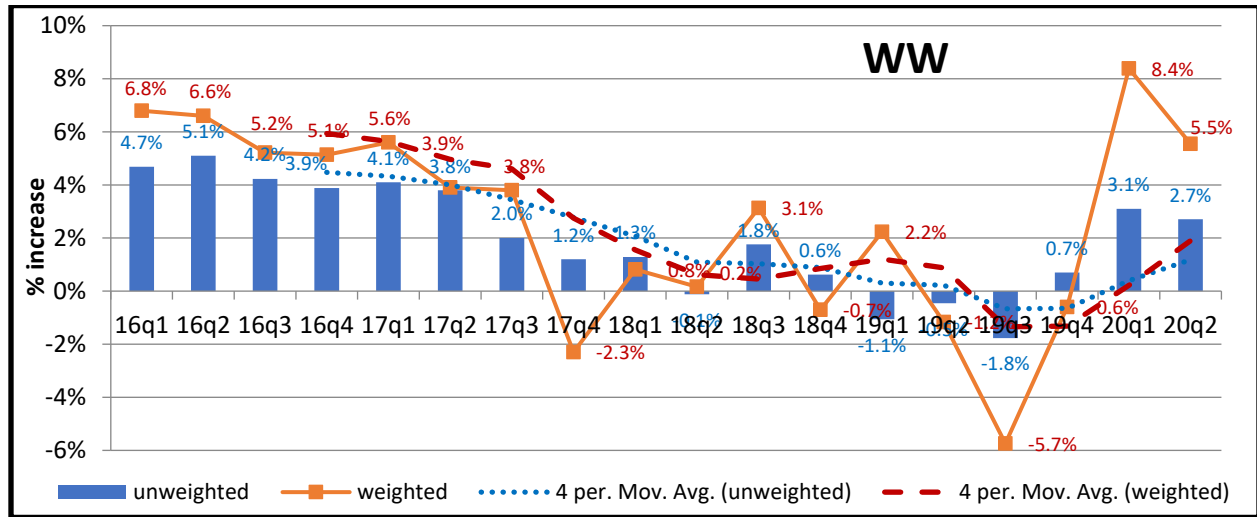
There was no live ILT delivered in 20q2.



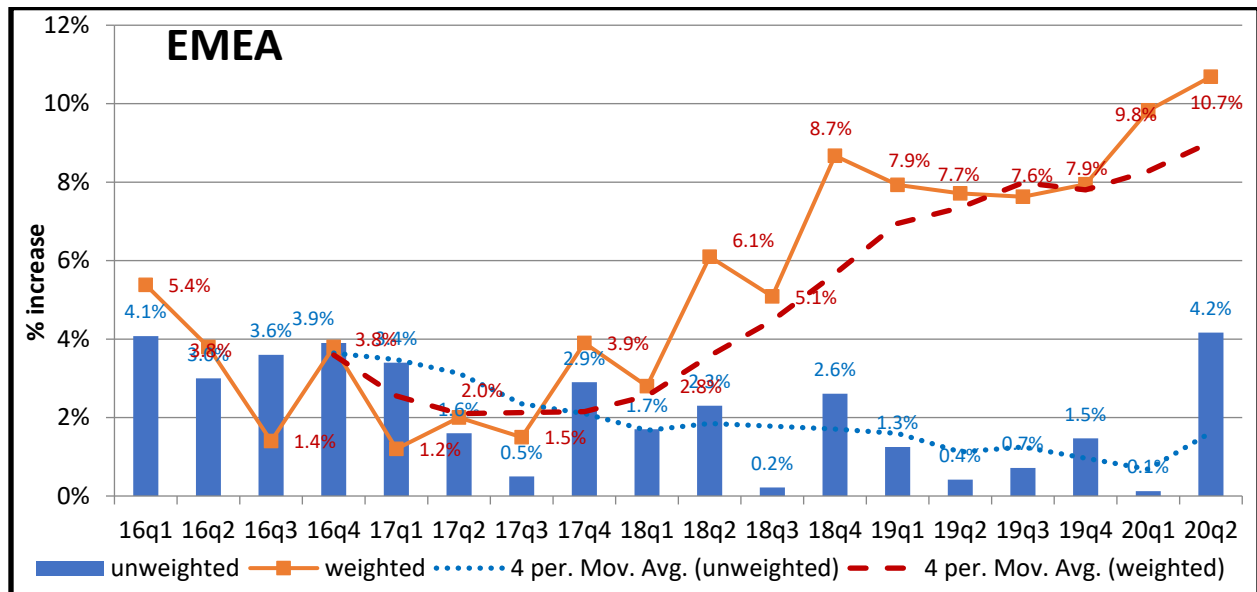
There was no live ILT delivered in 20q2.

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Virtual Instructor-led Training



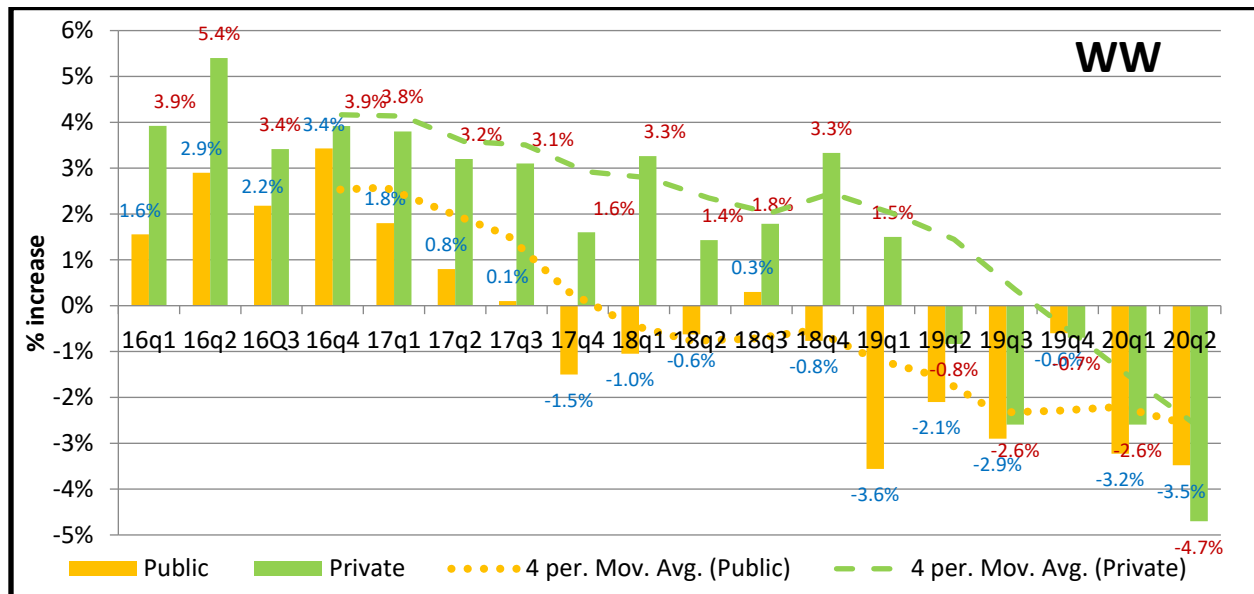
Virtual classroom has continued its upturn. The unweighted virtual classroom **revenue** increase for 20q2 (u=12, f=3, d=7) was 2.7%, with the weighted **revenue** increase at 5.5%. The increase in **volume** was 3.5%. The 4-period moving average for weighted is 2%, down from 3% in 2017 and 6% in 2015-16. Note that 22 reported revenue.



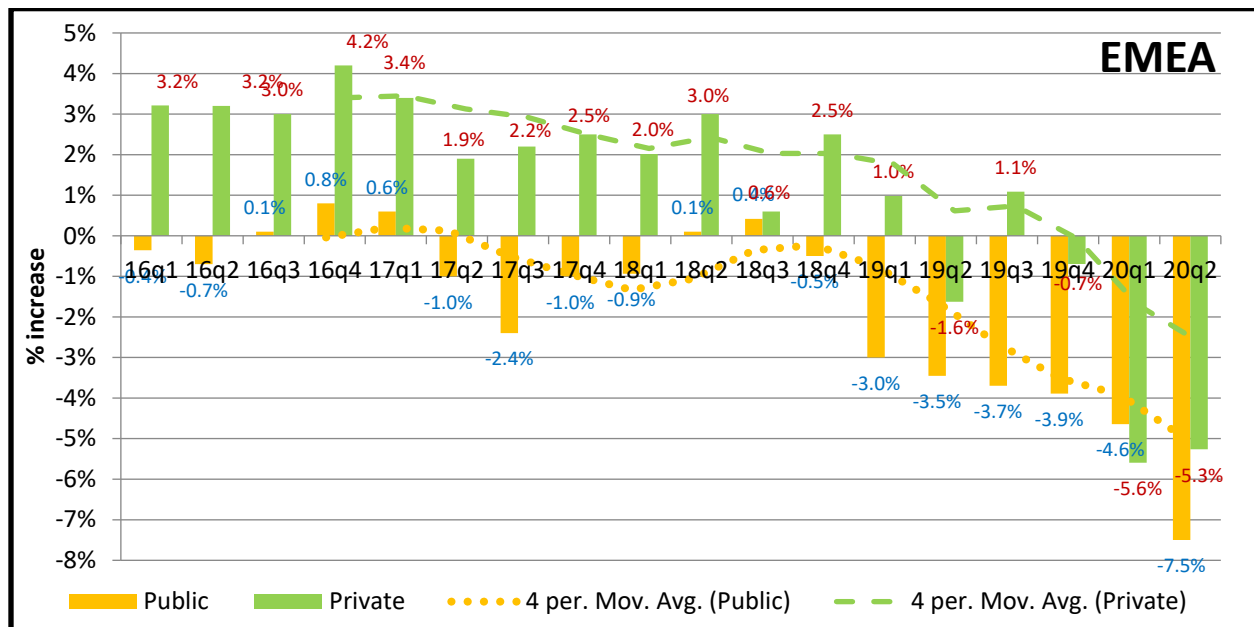
To compensate, the VILT increase was even greater than before. The unweighted 20q2 **revenue** increase is 4.2% (u=13, f=0, d=5) and the weighted increase 10.7%. The increase in **volume** was 3.7%. The weighted trendline shows an ongoing VILT increase of 9% when size of VILT revenue is considered, but it was 3-4% in 2016, having been 1% in 2014.

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Public v Private Unweighted



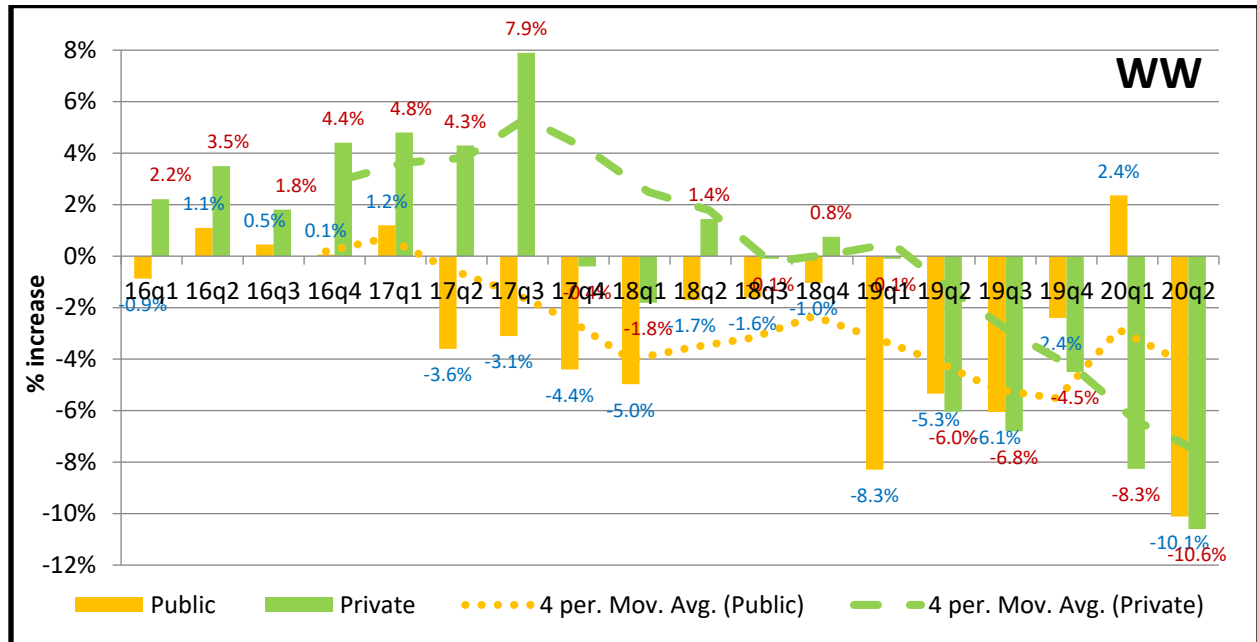
We include questions on public classes and private classes. Unweighted public **revenues** have decreased in 20q2 by -3.5% and private decreased by -4.7%. The decrease in **volume** was 0% for public and -3.1% for private. The trendline for public has dropped to negative 2-3% and to negative 3% for private. (Note that public is u=6, f=3, d=13 and private u=5, f=4, d=15.)



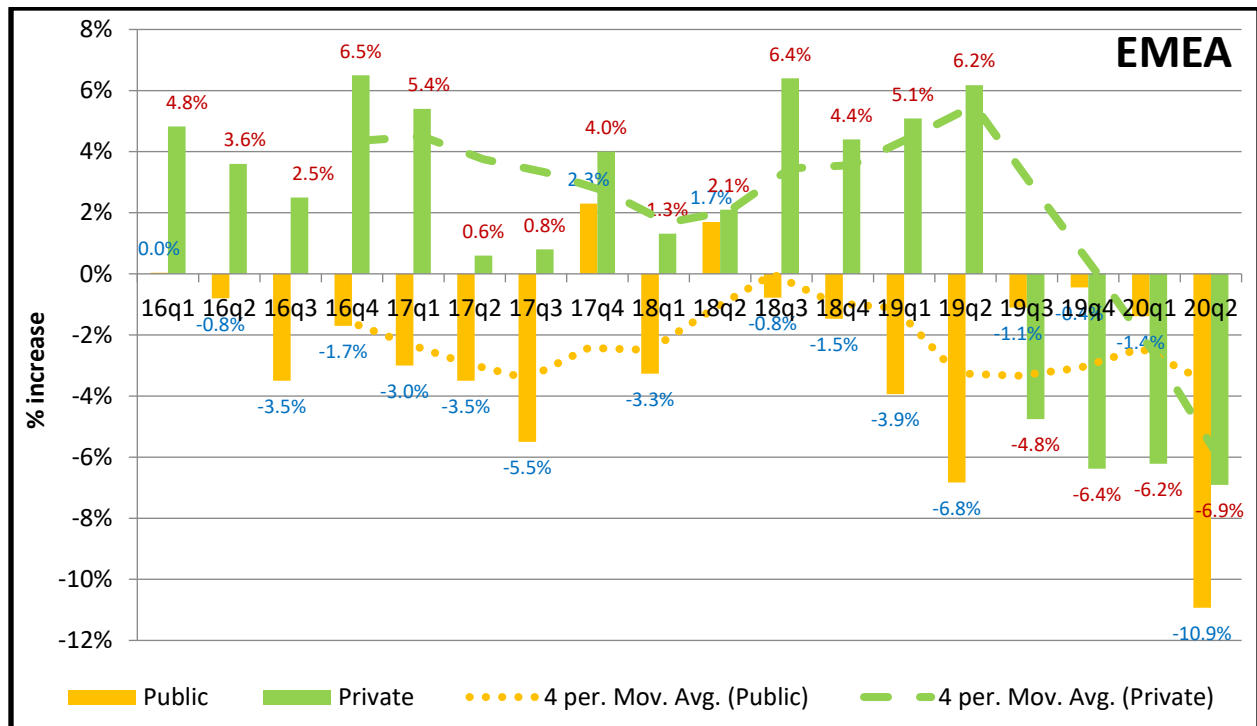
We are now asking you to forecast both public (u=3, f=0, d=16) and private (u=4, f=1, d=14) classes and have enough history to show that private classes show **revenue** is falling 2% over the last four quarters, whereas public classes are decreasing 5%. **Volumes** decreased -5.2% for public and -3.3% for private. This shows unweighted values.

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Public v Private Weighted



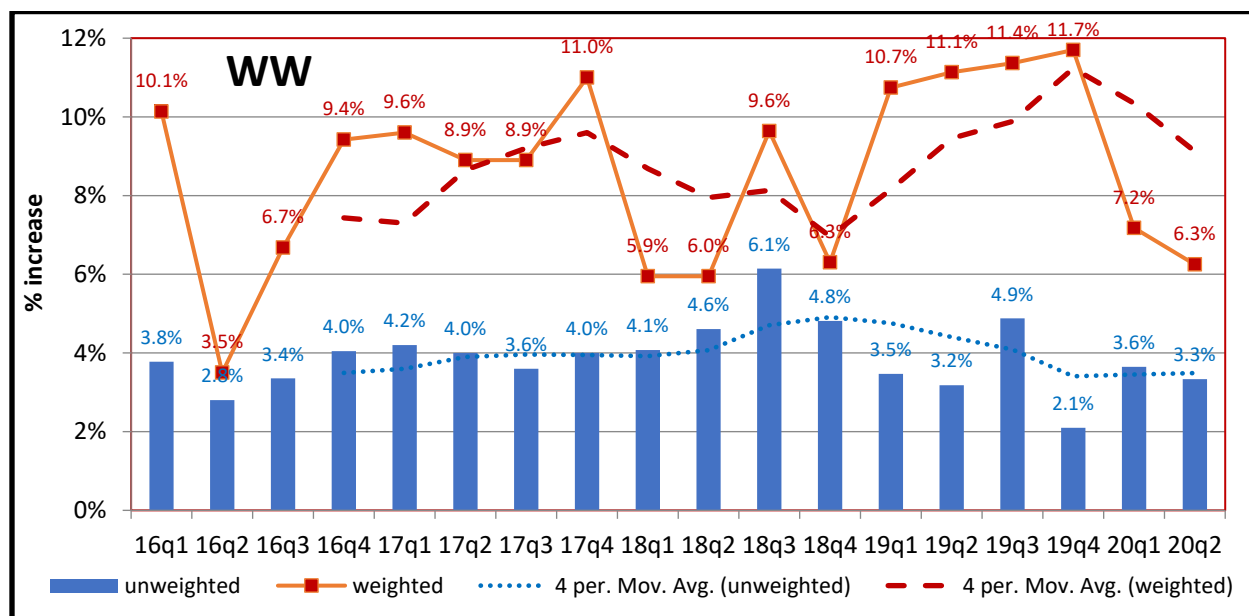
When weighting is considered, the changes are more dramatic. In 20q2, public **revenue** has decreased by -10.1% and private **revenue** decreased -10.6%. The 4-period moving average is negative 4% for public and negative 7% for private.



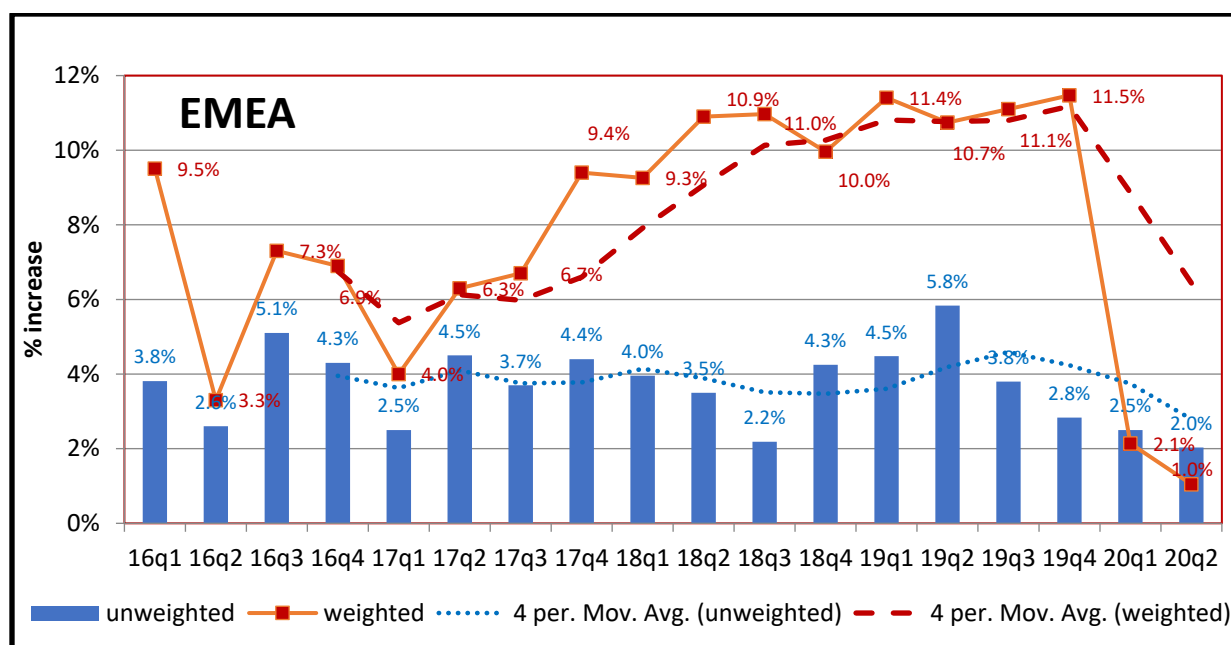
Weighted values have the **revenue** trendline for public showing negative 3-4%, private negative 5-6

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Self-Paced



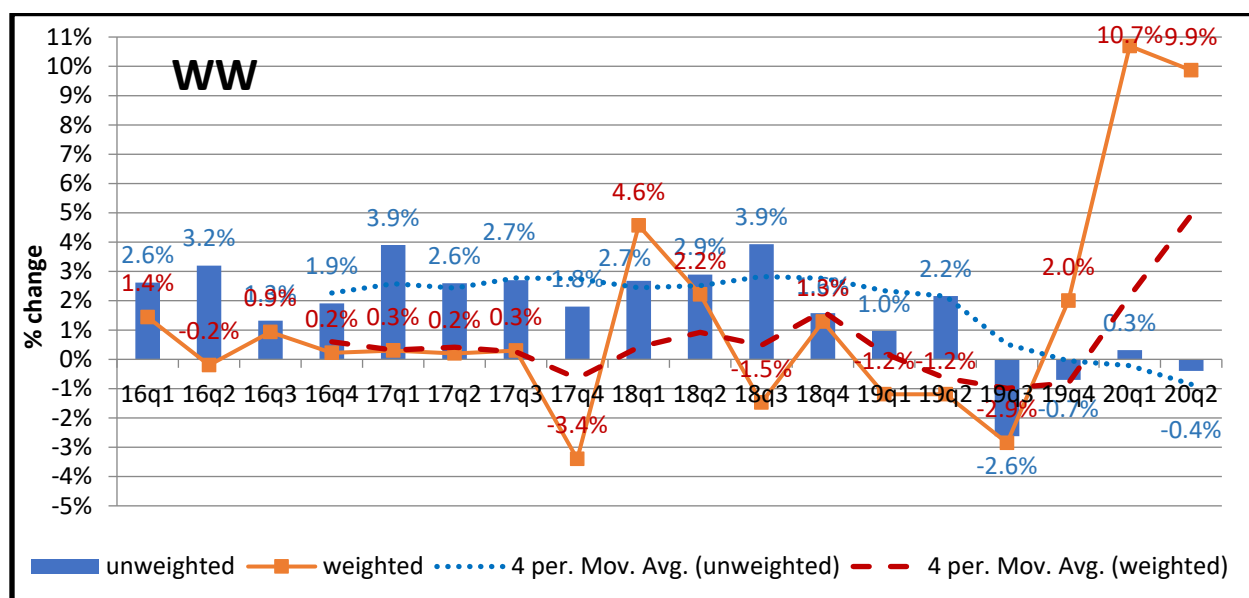
The unweighted self-paced **revenue** increase in 20q2 (u=11, f=2, d=5) was 3.3%. However, the weighted self-paced **revenue** increase was 6.3%. The increase in **volume** was 6.5%. The 4-period moving average shows 9% for weighted.



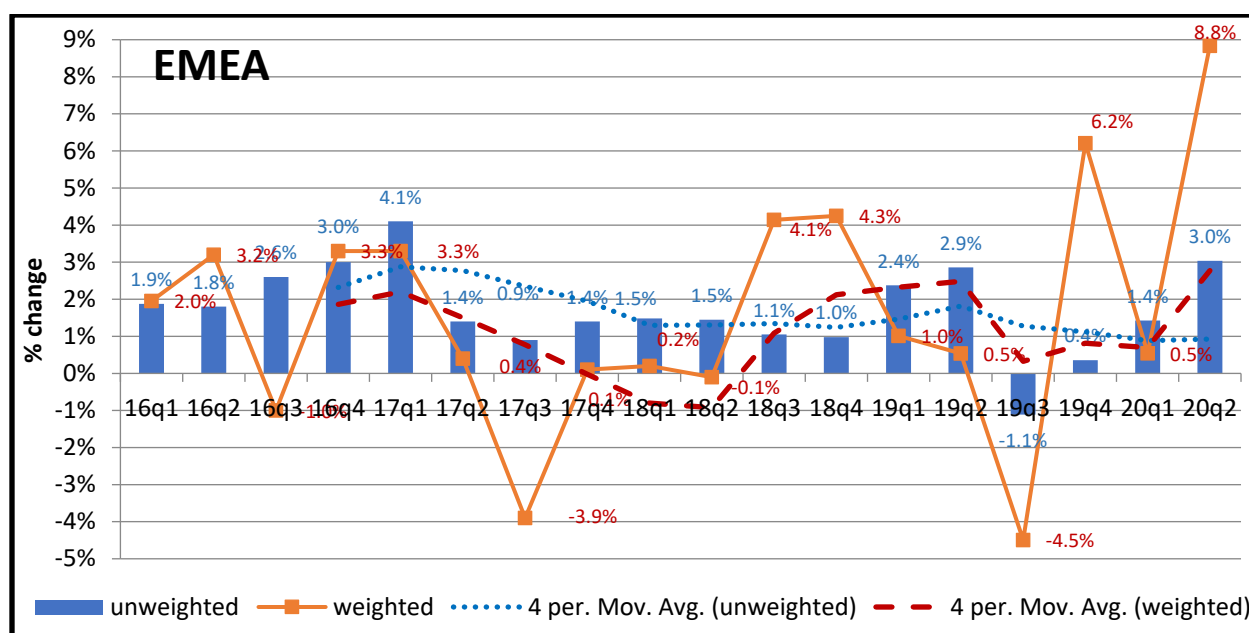
The results for 20q2 (u=8, f=3, d=5) were 2.0% increase unweighted and 1.5% increase weighted. The increase in **volume** was also 4.7%. Larger companies didn't have a significant effect on these averages this last quarter. The 4-period moving average shows an 7% increase for weighted.

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Certification



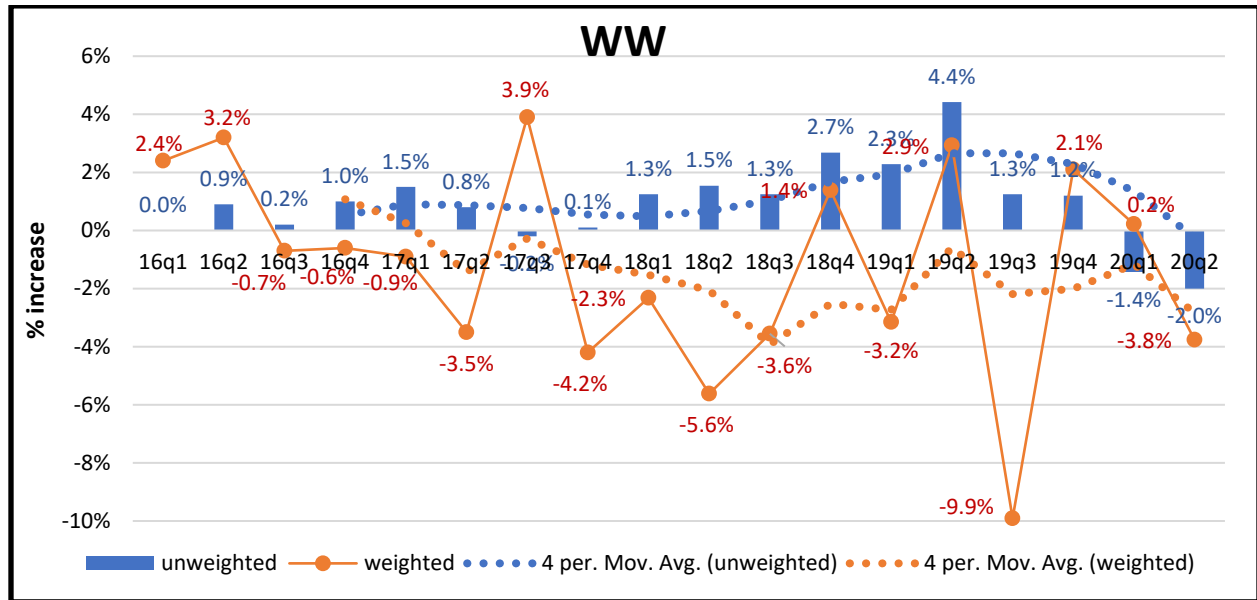
The unweighted certification **revenue** decrease for 20q2 (u=7, f=6, d=6) was -0.4%, but the weighted certification **revenue** increase was 9.9%. **Volume** was flat. The weighted 4-period moving average is 5%. Note that 19 reported revenue. The push by larger members was likely owing to the lack of live ILT.



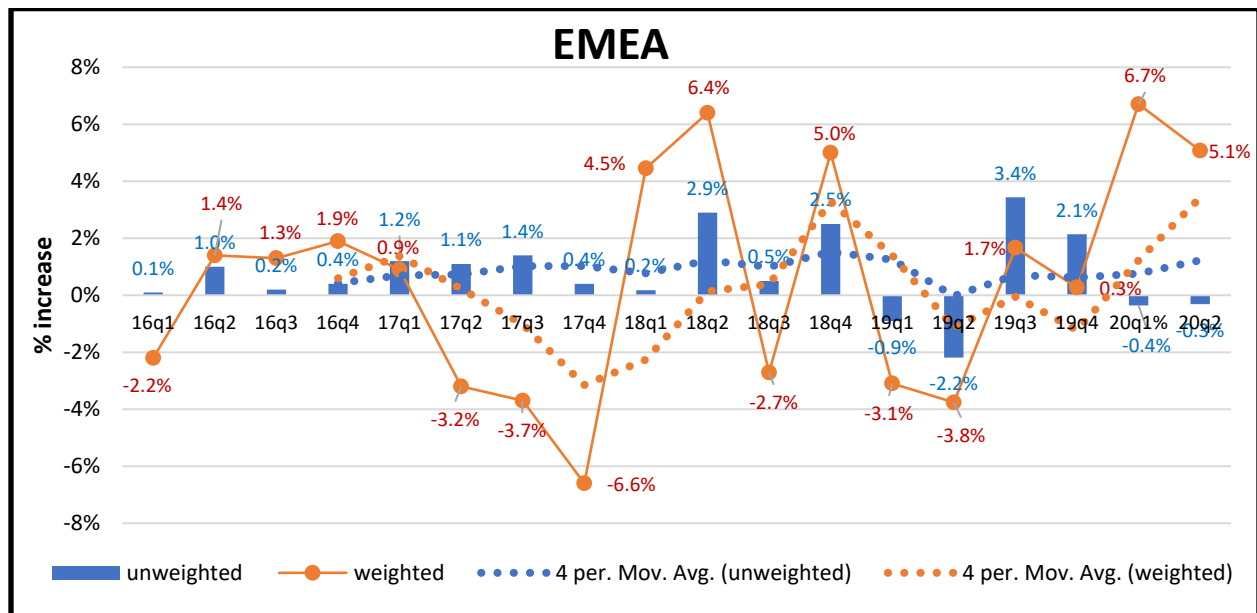
Certification has shown several swings over the last four years. However, the latest large increase has probably resulted from the push by larger members owing to the lack of live ILT. The increase in **volume** was 2.0%. The **revenue** increases for 20q2 (u=7, f=5, d=2) are 3.0% for unweighted and 8.8% when weighted. The weighted 4-period moving average is 3%.

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Learning Consulting



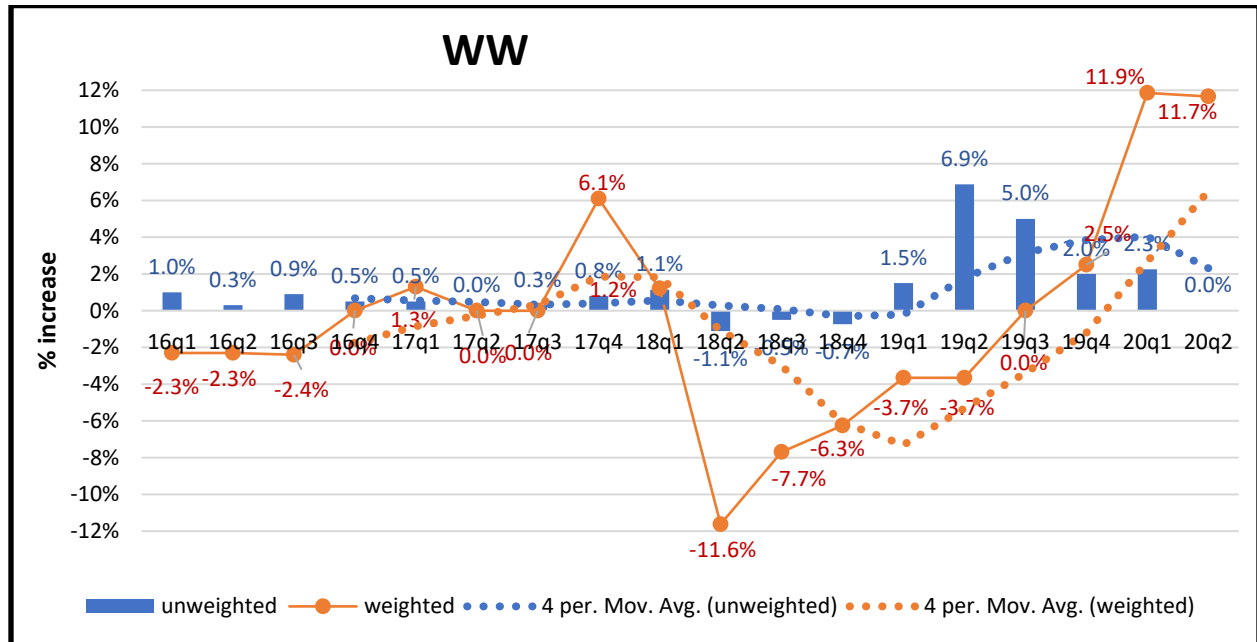
We now have over four years reporting this area. Weighted scores have been volatile and show a moving average of negative 1%. The decrease in **volume** was -0.7%. The **revenue** decreases for 20q2 (u=3, f=2, d=5) are -2.0% for unweighted and -3.8% when weighted.



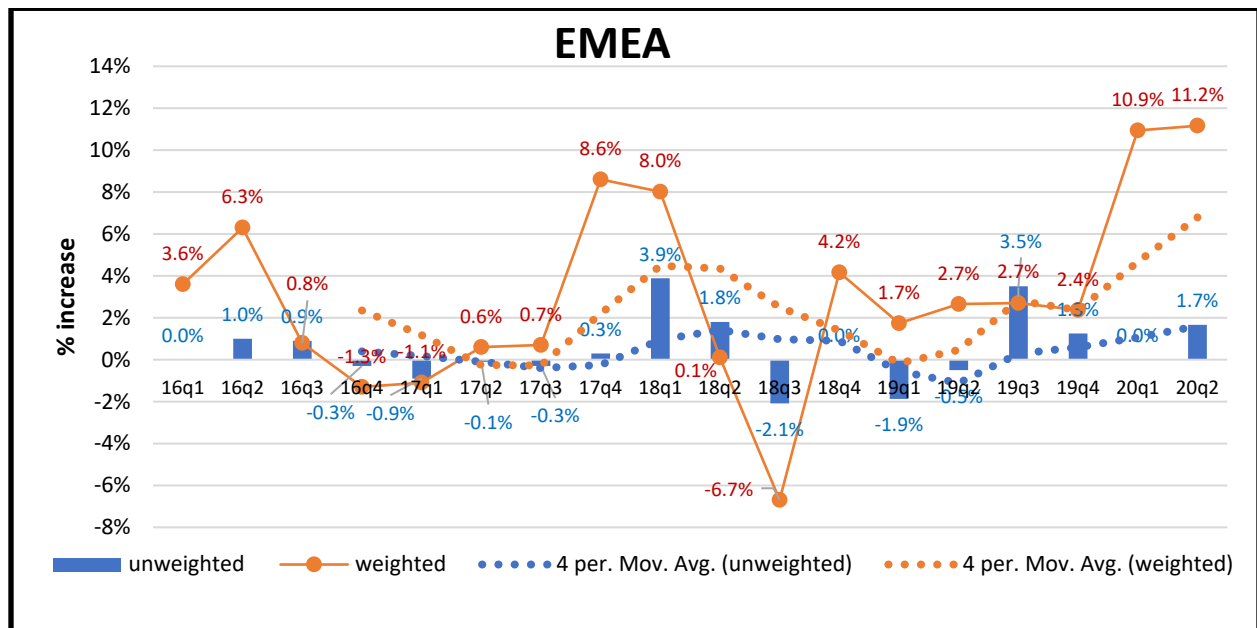
We now have over four years reporting this area. In that period, the unweighted scores have largely remained flat. However, weighted scores have moved dramatically. The **revenue** decrease for 20q2 (u=4, f=1, d=3) is 0.2% for unweighted but an increase of 6.7% when weighted. The increase in **volume** was 1.4%. The current four-period average for weighted is 3% increase.

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Learning Technologies



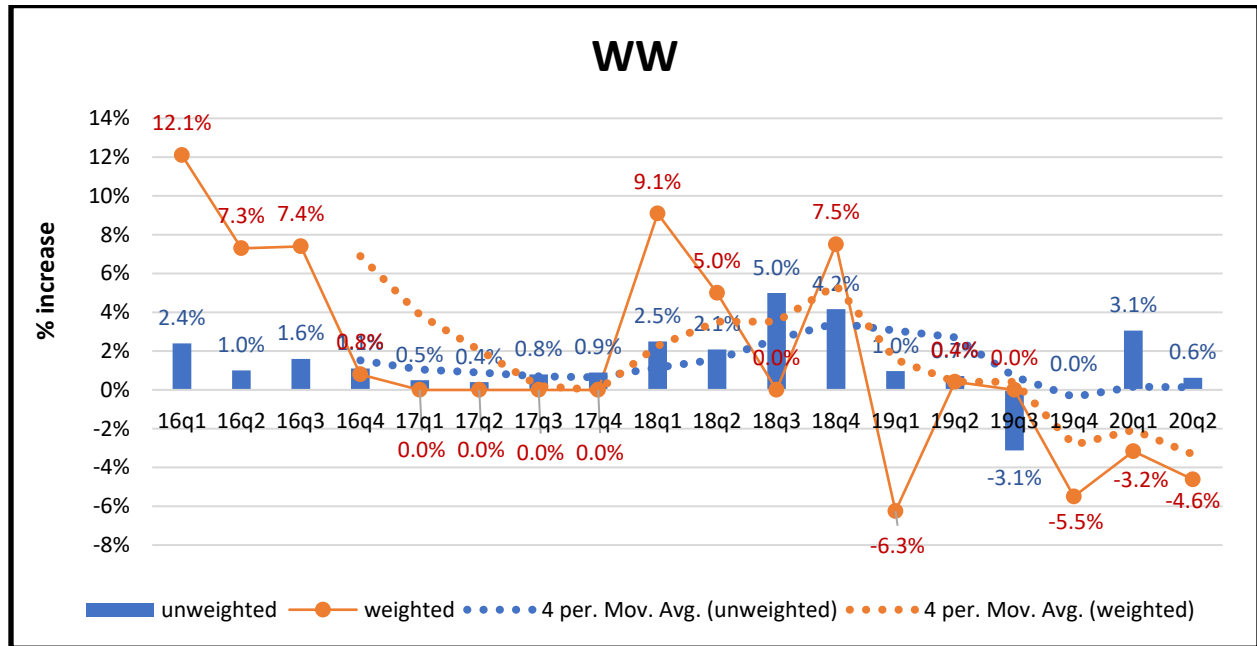
We also now have over four years reporting this area. The trendline for weighted scores now shows a 6% increase. The **revenue** increase for 20q2 (u=1, f=3, d=1) was flat for unweighted and 11.9% when weighted. Note that 5 reported revenue.



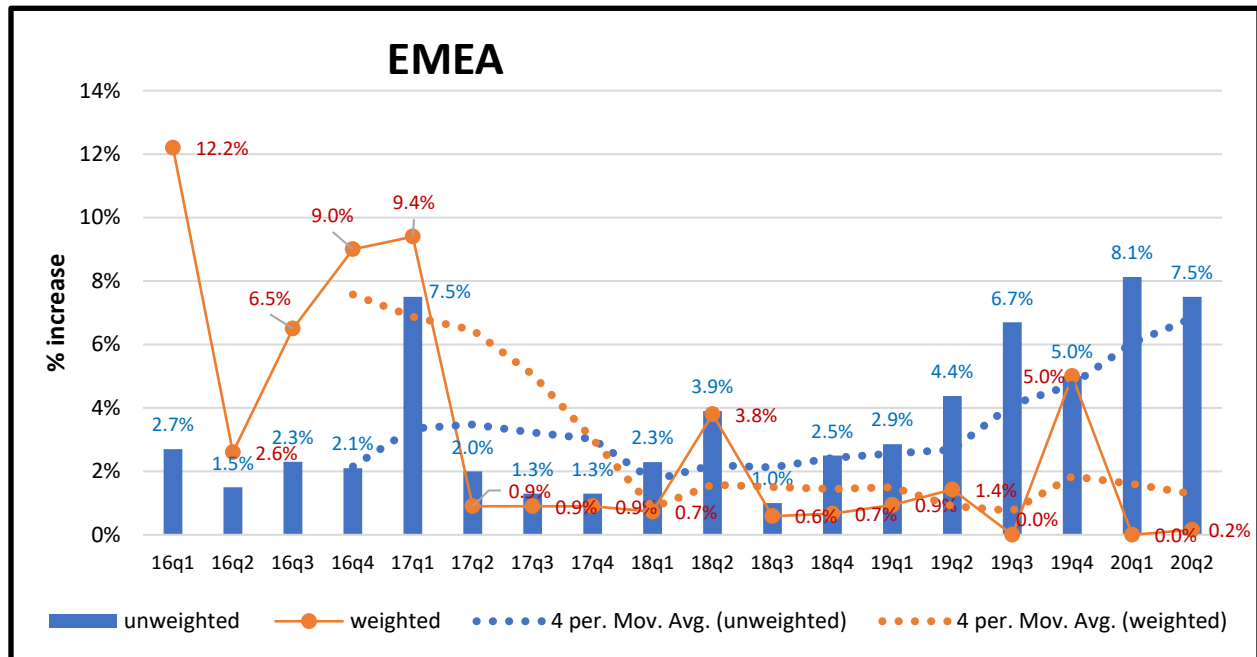
We also now over four years reporting this area. In that period, the unweighted scores have recently shown a little volatility. The **revenue** increase was 1.7% for 20q2 (u=1, f=1, d=1) for unweighted and a 11.2% increase when weighted. The trendline for weighted is 7%.

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New Learning Modalities



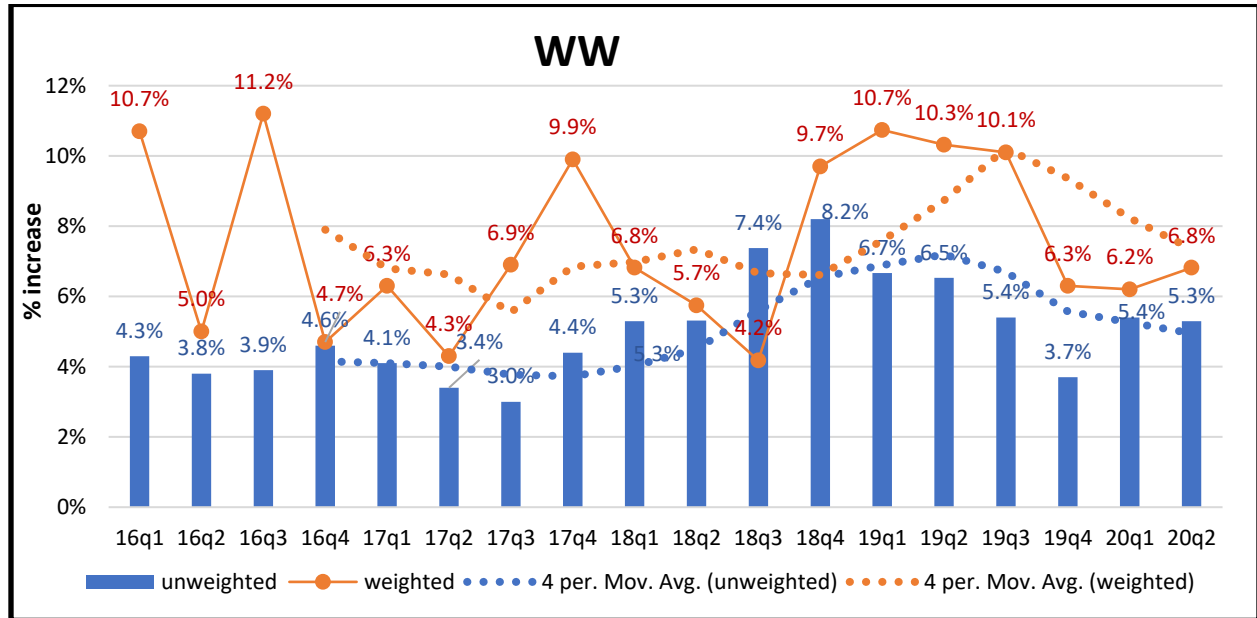
We now have 18 quarterly reports. In that period, the trendline for unweighted scores has fallen to flat and weighted scores negative 3%. The increase in **volume** was 1.9%. The **revenue** for 20q2 (u=2, f=1, d=1) is 0.6% for unweighted but -4.6% for weighted.



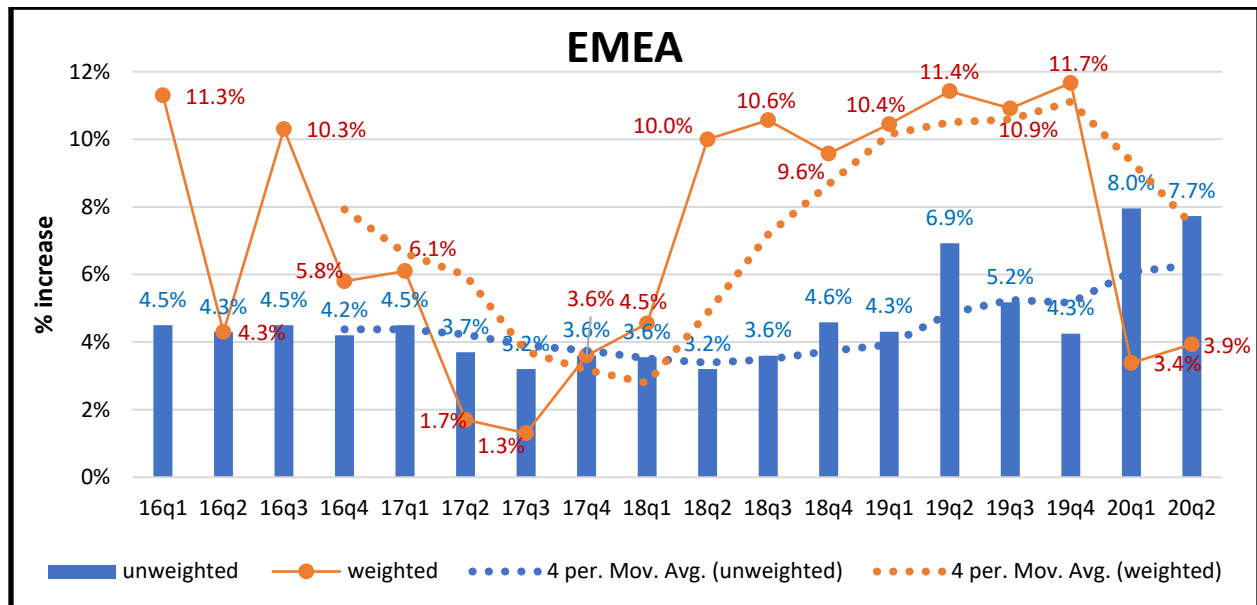
The unweighted trendline is 7%, while the weighted trendline shows 1-2%. The **revenue** increase for 20q2 (u=5, f=0, d=0) is 7.5% for unweighted but 0.2% for weighted. The increase in **volume** was 2.5%.

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Subscriptions



We also have 18 quarterly reports here. Currently, unweighted scores show a 5% increase and weighted scores 7-8%. The **revenue** increases for 20q2 (u=11, f=1, d=5) are 5.3% for unweighted and 6.8% for weighted. The increase in **volume** was 4.5%. Note that 17 reported revenue.



The unweighted trendline is 6% whereas the weighted trendline is showing a 7-8% increase. The **revenue** increases for 20q2 (u=10, f=1, d=0) are 7.7% for unweighted and 3.9% when weighted. The increase in **volume** was 6.0%.

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Which subject areas saw the biggest increases in your training revenues in the last 3-6 months?

WW	EMEA
<ol style="list-style-type: none"> 1. Our subscription sales (new and renewals) continue to grow. Subscription contains self-paced, eLearning and low stakes certification. 2. Training classes sold with Support Contracts ("Support Contract Attach") continue to grow significantly. We saw large increases in VILT student volumes, due to our moving exclusively to this delivery modality in response to Covid-19. Our eLearning/On Demand training is now accommodating more users than ever before but remains a small part of our overall business. 3. We have seen an increase in taking advantage of the self-serve option for the same ILT courses which contain the same content. it seems people are adjusting to how they learn to see the advantage of a flexible training schedule rather than a committed schedule. It also allows them to see the training materials as more than a box to tick or a one-time thing but a source of reference material in the time of need. 4. Introductory/Getting Started; Technical Foundations; Product Overview 5. Subscriptions/self-paced 6. Business in APAC and LATAM regions 7. Instructor led online 8. Classroom, technical training. Technical aspects of our SaaS product line. Customers are wanting more than features and functions. 9. Subscriptions 10. Virtual 11. Subscription is now over 75% of total revenue 12. Cloud Computing 13. Cloud-based products 14. Training and certification subscriptions for pharma supply chain software but our rate of growth has slowed.. 15. Self-paced learning and online learning 16. Subscriptions continue to grow, with COVID complete shift to Virtual Online occurred in all geos. Accelerated trend from previous 5-10 years. 17. Core technology Database FastTrack for DevOps 18. Virtual classroom and self-paced online courses 19. All training went virtual so that has been the largest increase 20. Subscription becomes the go to market and has considerable growth; Virtual training at core, aligned with the current context and future customer expectations. 21. VILT 22. DevOps 	<ol style="list-style-type: none"> 1. Subscriptions 2. Skill badges, self-paced labs 3. Self-Paced 4. Partner Enablement 5. Self-Paced Learning Labs 6. Digital Learning 7. Subscriptions 8. Subscription is taking up really nicely 9. Microsoft, Storage, IT Service Management 10. Self-paced 11. We are now scheduling all courses as Virtual so this has increased the potential market as delegates are not waiting for the course to be in a particular location 12. Learning Portal creation; Live web delivery - we offered a lot of free public course places on our Live Webs in April and May; Learning Subscriptions 13. Companion software has increased (Self training software) 14. Commerce and Marketing Cloud 15. Self-paced, VILT 16. DevOps 17. Subscriptions and Consulting - offering is moving from pay per seat to subscription so traditional classroom is declining as expected. User Adoption consulting services is the growth area and opportunity for increased revenues

23. IP Audio Essentials; ACS (VMS); Multisensors; Camera Interface; Perimeter protection; Inner area protection; Body Worn; IP Intercoms	outside of the subscription business
24. Private classes; eLearning	

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Which subject areas saw the biggest decreases in your training volumes in the last 3-6 months?

WW	EMEA
<ol style="list-style-type: none"> 1. Our ILT \$0 this quarter this year and this quarter last year. In general, we have seen the demand for in person ILT drop off significantly over the past couple of years. We were able to hold a small number of VILT in H1 2020. Our 1:1 onsite training has also dropped off a cliff due to Covid19 and is being replaced with remote training services. 2. None, growth is 25-30% in all segments at present. 3. Public (open) enrollments - F2F training - collapsed due to impact of Covid-19; Prior to Covid-19 our Learning Consulting business was recovering rather nicely from a poor 2019, but now due to Covid-19 this part of our business is in decline as well 4. Private training requests (either remote or onsite) have continued to decrease as more and more partners/customers are adjusting their schedules to take advantage of free training offered on a scheduled basis. Also, the same content is being offered on a self-serve basis but without certification. Partners/Customers are focusing more on developing the skills when needed. 5. End User Training 6. Public training, although our training business continues to decrease. 7. Public and private classroom delivery on legacy product 8. Certification 9. Live Webinars. They want them recorded and watch them later. 10. Public Training 11. Public live classroom 12. VILT/ILT - bundled as part of subscription program as per our strategy to drive 80% plus subscription. Moving traditional services revenue over to SaaS model 13. Firewall 14. Our private implementation training volume has decreased but that's because new sales of our products have decreased. This is due to a lack in new compliance regulations so a natural fall-off, not related to Covid-related economic 15. Live classroom (in-person) 16. Private Onsite Training went to zero with COVID; Public Classroom Training went to zero with COVID 17. Search, Analytics and Graph 	<ol style="list-style-type: none"> 1. Public courses face to face, in general ILT but also some self-paced 2. Dedicated onsite training 3. Public/F2F. 4. Live Virtual Classroom 5. Live Classroom. 6. Direct onsite Classroom Training - Strategic decision 7. ILT classes; Open Enrolment/public scheduled live classes since March (thx to COVID-19) 8. Networking, Security 9. Live classes 10. Anything classroom based; Public Schedule classes; Onsite courses 11. Classes delivery has decreased 12. Face to face onsite/public 13. Traditional pay per seat offerings - as expected

18. Public classroom training, especially over the last month with the introduction of the COVID-19 travel restrictions and work from home policies. 19. Custom business, live public classes (in person) and on-sites 20. Live training and private sessions; Learning Consulting due to COVID 19, convert to virtual presence where possible, otherwise delivery moved to the right 21. Instructor-Led Face to Face 22. Network Video Fundamentals and certification; VMS Audio 23. Public schedule classes in a classroom; Certification	
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What were the two greatest challenges you faced in running your business in the last 3-6 months?

WW	EMEA
<ol style="list-style-type: none"> 1. Covid19 has hurt many of our customer's business which has impacted new sales and implementation of new projects. Our onsite training workshops (part of new customer implementation methodology) are now being held virtually in 3-4 hour increments. Customers tend to delay subsequent virtual sessions, which extends the duration of our implementation projects. 2. Covid only impacted our customer conference expectations around training and certification. We did half the volume we expected to but the switch to virtual was easy for us. Always a challenge to get IT projects prioritized in a FAST growing company...it hampers our innovation at times. Finance messing with our business is also a pain. They ask for margin positive results and then pull the rug out from under us where we need it most! 3. The pandemic has crushed certain sectors of our business. Our mitigation and recovery efforts have helped stem the bleeding, but our overall business is down. Many of our EMEA and APJ customers are still insisting on face to face instruction...meaning recognition of these revenues will be delayed. Fortunately, the vast majority of our instruction in North America was already delivered virtually before the pandemic, so the overall Covid-19 impacts in North America are less pronounced than in other places. 4. Team capacity - the business and our product direction are changing rapidly, our team does not have the capacity to carry on providing training and generate 	<ol style="list-style-type: none"> 1. Decreasing overall volume of students; free training offers 2. Covid-19: pivoting to 100% virtual and online proctored certification 3. Convincing customers that "No I won't have an instructor travel just for them". Pipeline generation by a sales team working from home. 4. Resourcing for multiple language requirements for resources and content. 5. Sticking to our cancellation Ts&Cs with the Pandemic forcing cancellations. Only have 1 or 2 people booked on classes, do we run or cancel. 6. Ensuring scalable online capacity. Transferring all classes to online with different government advice in different countries 7. Backlog and development for acquisitions. 8. Move to partner-based deliveries. Lockdown means no ILT possible 9. Keep partners selling/reselling our offerings - the vast majority of the decline we see in the business is actually because partner contribution sharply declined during

<p>brand new programs within the required timelines. I stated this last survey, and this still remains as our biggest challenge. Our second biggest challenge is our organizational structure. Our department has been moved into the Product Development department. So now are budget needs are being weighed against product development which always wins. The methods and tools required to deliver training in this new environment are not being supported by the company. They want the change but don't want to do what it takes to make the change happen as they continue to allocate budget to the product development initiatives. The Education department has been moved across the organization 3 times in <1 year. This has been very disruptive and stagnates (or slows) our ability to deliver, make progress, and plan as we are continually having to re-get company buy in. We had better buy-in and budget allocation when under the Partner Enablement (Services) department.</p> <ol style="list-style-type: none"> 5. Recruitment of SMEs to develop training content; Managing and maintaining legacy content 6. COVID 19 7. New product released that has a different, lower revenue generation model for EDU and declining sales of legacy product 8. COVID 9. I don't have the proper resources to deliver the training product that needs to be delivered. Change of my manager 3x this year (and the year isn't over!) 10. Translation of material; The hiring of Instructors with appropriate languages for new countries. 11. Global trade affecting manufacturing industry; quantity of attach rate of ILT (1 seat no matter deal size) 12. Bandwidth and subscription churn 13. Accelerating content development time to align with Engineering; Simplification of messaging to promote sales adoption 14. Eliminating all customer-facing training and shifting to having those classes delivered by our Authorized Training Centers; COVID forcing us to a 100% virtual (live-online) schedule. 15. Our company is changing direction and developing a new platform but it's slow going. The uncertainty is affecting morale so we're losing employees. 16. Prove the value of training to overall company revenue and education services results. 17. Postponement of classes due to COVID; 30% customers did not take the remote delivery option. 	<p>COVID-19. Make corporate sales and the consulting organization automatically attach training to product deals or Consulting projects.</p> <ol style="list-style-type: none"> 10. Covid 19 has crushed our Face-to-face training business. We have moved this business now completely to virtual delivery, but the majority of our EMEA customers still "reject" this delivery modality and are now delaying their training, waiting for the pandemic to ease so that they can return to the classroom. It is of course far from certain as to when this will happen. Our Learning Consulting business has been negatively impacted by Covid-19 as well. Students are moving to On Demand training alternatives but are slower to do this in EMEA than they are in for example North America, due to content language issues. 11. COVID impact on ILT business; Budget restrictions for training 12. COVID - initially we thought we would be back in the classroom in October but have now decided to stay virtual for the rest of the year. This meant rescheduling the courses again. Venue providers are now closing due to lack of business which could mean needing to find new venues in the future. New sales have stalled a little whilst people wait to understand the impact of Covid on their business - training is often one of the first things to be removed in deals 13. Customer unwillingness to switch from Classroom to Live Web for their Onsite courses since COVID. Many customers are waiting for classrooms to reopen. Organisation desire to please the customer by giving away training. Internal competition from Customer
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<p>18. All 17 of our global public training centres have been shut down and all of our training services at customer sites have been put on hold. The latter is now starting to resume but very slowly</p> <p>19. Covid-19</p> <p>20. Achieving plan in the context of COVID-19; Streamline internal processes and build a next gen infrastructure</p> <p>21. Impact of Covid</p> <p>22. Moving to a faster development model; Increased pressure to delivery partner training for free</p> <p>23. In person Training; Travel</p> <p>24. COVID!!!!</p>	<p>Success/Customer Loyalty Teams who have gone in to the free Webinar business. Corporate initiatives to give away e-Learning at the start of COVID now making it difficult to make customers pay for e-Learning.</p> <p>14. Define new training experiences; Build a real Certification plan</p> <p>15. Managing through a very climate volatile</p> <p>16. Covid 19 impact</p> <p>17. Moving to a faster development model; Increased pressure to delivery partner training for free</p>
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Please add any other comments or observations you have on the state of the IT Training market

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<p>1. Our training and certification business remain on a strong growth trajectory. We've never invested in brick and mortar experiences and in this time of pandemic, it's proven to be a wise bet.</p> <p>2. We will continue to pivot to virtual and On Demand delivery. We are in fact aggressively promoting and discounting our On-Demand content.</p> <p>3. It is an exciting time as a lot of innovation going on and it seems there is more understanding that 'traditional' learning program methods are not as effective. So, there is more buy-in for innovating programs and more technologies available to support these innovations.</p> <p>4. Interest in on-demand training and subscriptions are increasing</p> <p>5. It's imperative (already underway) that we change our business model.</p> <p>6. COVID-19 has had an impact in implementation projects, which have slowed down both the instructor led and learning consulting business, with delays expected until end of summer</p> <p>7. Customers desire more micro training and certifications</p> <p>8. Partners are willing to learn with more autonomous methods than customers.</p>	<p>1. ATP's core revenues heavily impacted as they switch to 100% virtual.</p> <p>2. French, German and Pakistani customers seem most resistant to virtual deliveries. Is there a trend?</p> <p>3. Big move to Self-Paced acceptance.</p> <p>4. Now running a pure partner EDU model.</p> <p>5. More customised content being requested</p> <p>6. Getting back to a classroom training is SO SO MUCH more complicated than expected - corporate policy, customer policy, local law etc makes it almost impossible at the moment.</p> <p>7. The pandemic has had a dramatic, negative impact upon our EMEA-based business.</p>

<p>9. A move to online proctoring helped keep one part of our certification business going. Requirement for Training teams to tie into corporate goals more apparent than ever; but reporting on direct influence on Lifetime Customer Value, Churn, Expansions, and so on, is challenging. Cloud expanding rapidly. Discretionary spending in market is drying up; need to align training to specific customer projects to support budgeting. Interest in subscription/digital training; but still limited engagement over time from end users</p> <p>10. Most companies like ours are also providing "informal" education, for example, Developer Days. Meetups and professional forums are covering reasonable intro to intermediate training. Offering more informal education delivered by customer/developer advocates.</p> <p>11. Big opportunities have arisen through being able to introduce Virtual Classroom training which we never had before. We also received plenty of support from across the org to develop a lot of new self-paced online courses (effectively doubling our portfolio). We are reviewing our strategy and aiming to implement online learning subscriptions by Q4</p> <p>12. Customers requesting more virtual offerings or blended approaches. Digitalization and gamification becomes a main part of the learning methods</p> <p>13. Continuous growth</p> <p>14. Introduction to the market - VILT</p>	<p>8. We are in the process of transforming our training offerings into a subscription model</p> <p>9. Hoping to have a stronger virtual business as a result of this as it is more profitable and increases capacity due to not needing to travel between engagements.</p> <p>10. We are finding more traction with customers by selling Subscriptions and prepaid offerings than day to day transactional business. Working with software sales has improved.</p> <p>11. The impact of Covid is mixed and varies per country, often dictated by Government policy and funding. France is seeing growth due to Government funds. Other countries are seeing decline. Also, it's a mix of delaying bookings or making short term decision to attend, booking last minute</p>
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