



CEdMA Worldwide Training Market Barometer 1st Quarter 2021

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.

There were 34 inputs for world-wide (five of which were North America only) and 24 for EMEA. **These increases result from a concerted effort to include more members. Several members provided input for the first time with several more committing to do so in the future once they have the historical data.**

Contents

[Member Profiles](#)

[Summary](#)

[Volumes as well as revenue](#)

[Overall Training Revenue](#)

[Training Profit](#)

[Live Instructor-led Training](#)

[Virtual Instructor-led Training](#)

[Public v Private Unweighted](#)

[Public v Private Weighted](#)

[Self-Paced](#)

[Certification](#)

[Learning Consulting](#)

[Learning Technologies](#)

[New Learning Modalities](#)

[Subscriptions](#)

[Biggest subject areas increases in last 3-6 months](#)

[Biggest subject areas decreases in last 3-6 months](#)

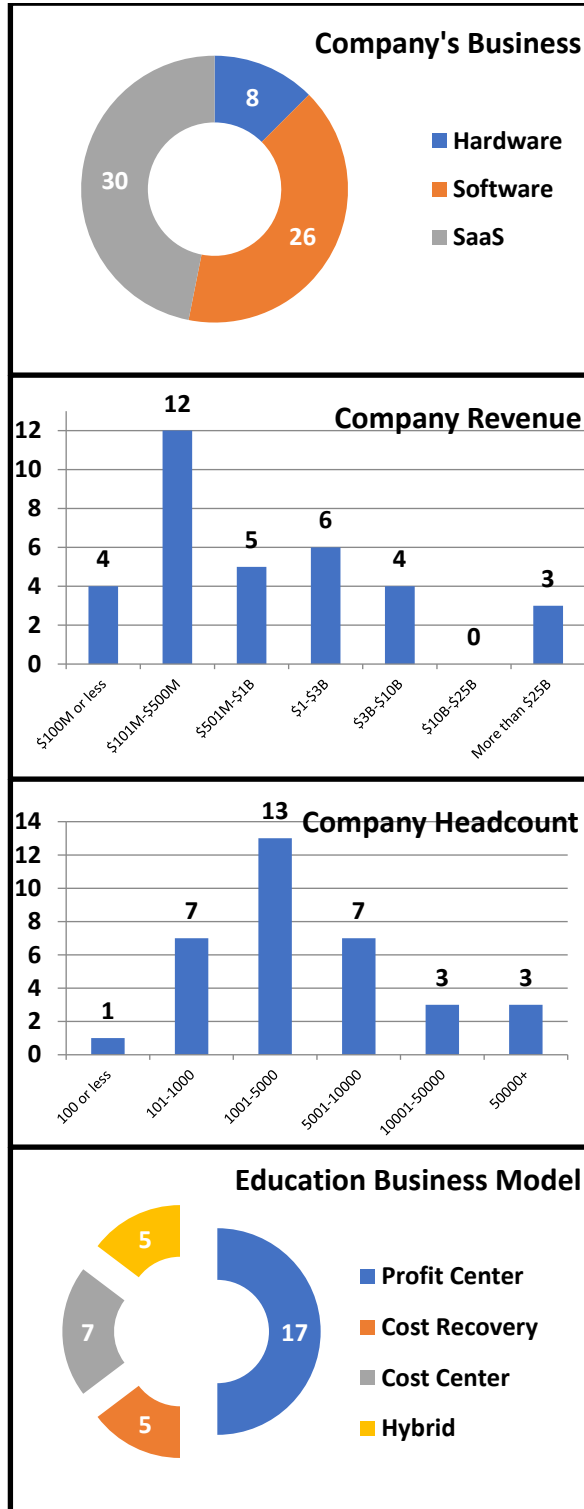
[Two greatest business challenges in last 3-6 months](#)

[Observations on the state of the IT training market](#)

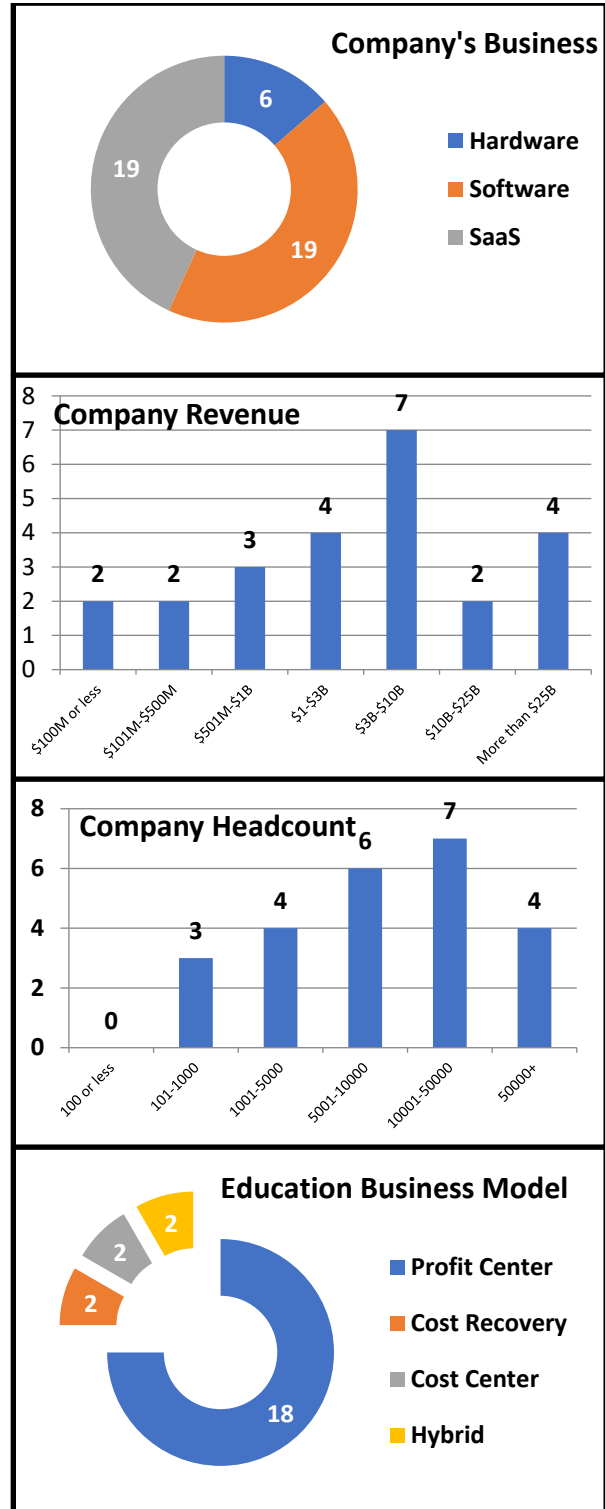
Member Profiles

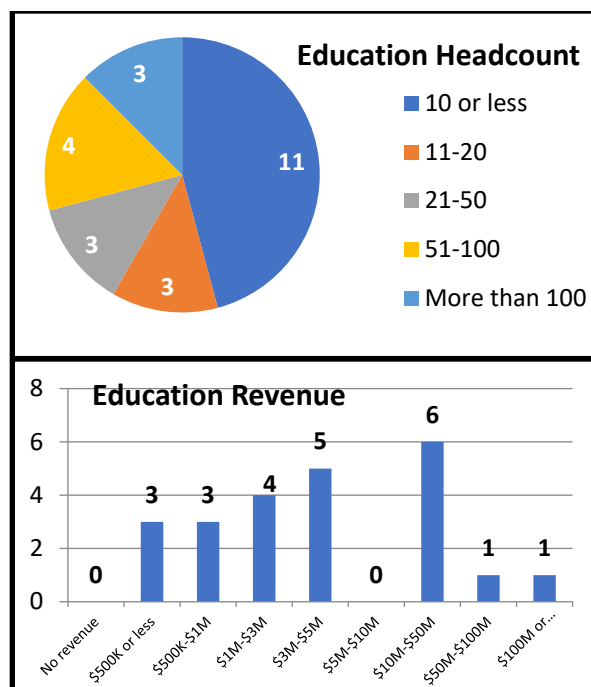
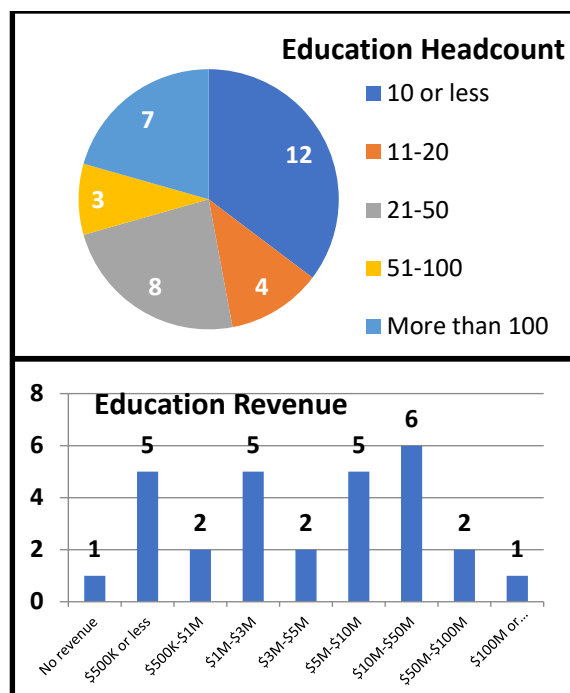
Sample size for 21q1 was 34 for Worldwide and 24 for EMEA.

Worldwide



EMEA





[Back to top](#)

Summary

The unweighted average uses all responses as entered, whereas the weighted average uses the size of the revenue, taking the corresponding 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 just under flat through 21q1.

EMEA: Having been down to negative 2% in 2014, the trend recovered to positive 2% increase in 2016 and 4% in 2019 but is now negative 1-2% through 21q1.

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

WW: The growth trend is up to 3% at 21q1, down from 4% in 2016, and 3% in 2018. Cost reduction by larger members has helped bring the figure back to 3% positive from a recent dip into negative territory.

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 flat under through 21q1.

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 21q1.

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 21q1.

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

WW: Growth dropped from 6% in 2015-16, to 3% in 2017, dipped to negative 2% in 2019 but is now

showing 9% growth in the absence of live training.

EMEA: The trend dropped from 6% during 2013 to 1% in 2014-15 but has risen steadily to 11-12% through 21q1 in the absence of live training.

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

WW: The trend has dropped to negative 10% through 21q1, having peaked at 1-2% in 2014, and been flat in 2015-16, but negative since 2017.

EMEA: The trendline was negative 3% in 2019 but is now negative 11% through 21q1.

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

WW: It's now showing a trend of negative 6% in 2020, 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 6% through 21q1.

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 7% increase through 21q1, having grown steadily from a 5% increase in 2013 and 11% in 2019. The smaller increase may be that lots of free self-paced was given once live ILT died.

EMEA: After climbing to 11% increase in 2019, it's dropped back to 6-7% increase year on year in 21q1 but was as low as negative 4% during 2013-14. A lot of free self-paced was given in 2020.

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 11% through 21q1 having been flat for four years. The pandemic disruption has pushed many customers and partners back to re-skilling and certification.

EMEA: The trend is up to 8% in 2020 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 positive 6% through 21q1.

EMEA: The increase was 3% in 2018 but slipped to flat in 2019 but now is back up to 7%.

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 21q1 is showing flat as there has been a significant recent downturn probably caused by much less onsite work allowed.

EMEA: This is very similar with the trendline showing 2% but a significant recent downturn. But with only three large members reporting revenue, this is unreliable overall.

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

WW: 2018 showed the trendline at 5%, in 2019 it was negative 3%, but now it's positive 3%.

EMEA: The trend has jumped from a steady 1% to positive 7%.

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

WW: Subscription revenue has grown from 7% during 2017 to 9% during 2019 but it's now 9%.

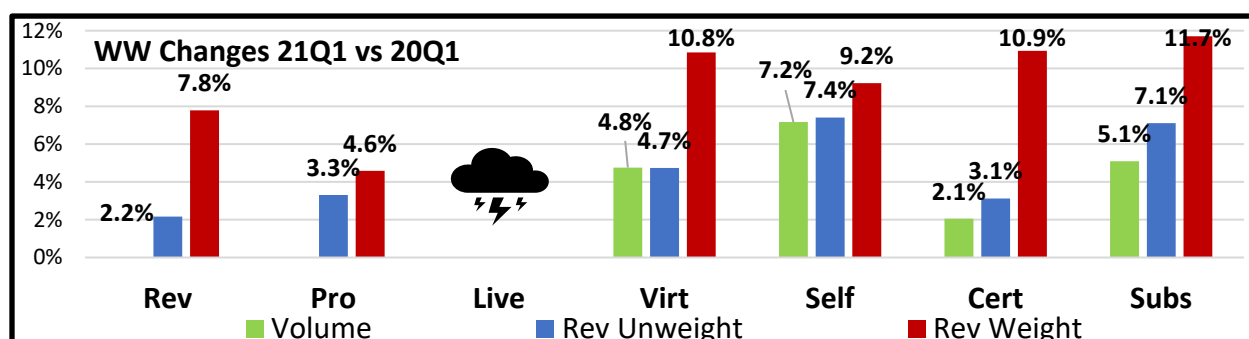
EMEA: With many companies starting in 2015/16, the increase was 8% over 2016, dipped to 3% in 2017, rose to 11% in 2019, but has fallen back to 8-9%.

[Back to top](#)

Volumes as well as revenue

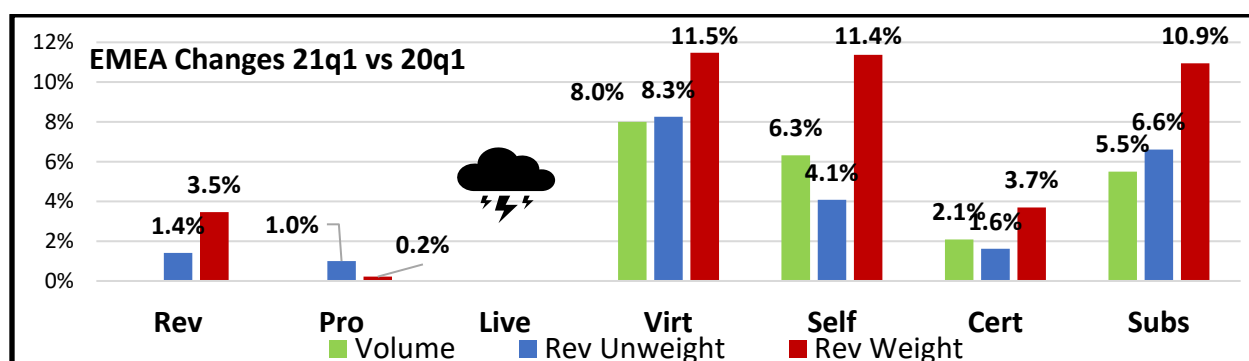
We now ask for percentage movement of modalities by volume of students in addition to or instead of revenue. Of course, volume averages will only be for unweighted input. Here's the comparison for 21q1.

| WW | Rev | Prof | Live | Virtual | Self | Cert | Subs |
|--------------------|------|------|------|---------|------|-------|-------|
| Volume | | | | 4.8% | 7.2% | 2.1% | 5.1% |
| Revenue Unweighted | 2.2% | 3.3% | | 4.7% | 7.4% | 3.1% | 7.1% |
| Revenue Weighted | 7.8% | 4.6% | | 10.8% | 9.2% | 10.9% | 11.7% |



The significant revenue increases for 21q1 compared to 20q1 are virtual instructor-led, self-study, certification and subscriptions. Live instructor-led simply did not happen.

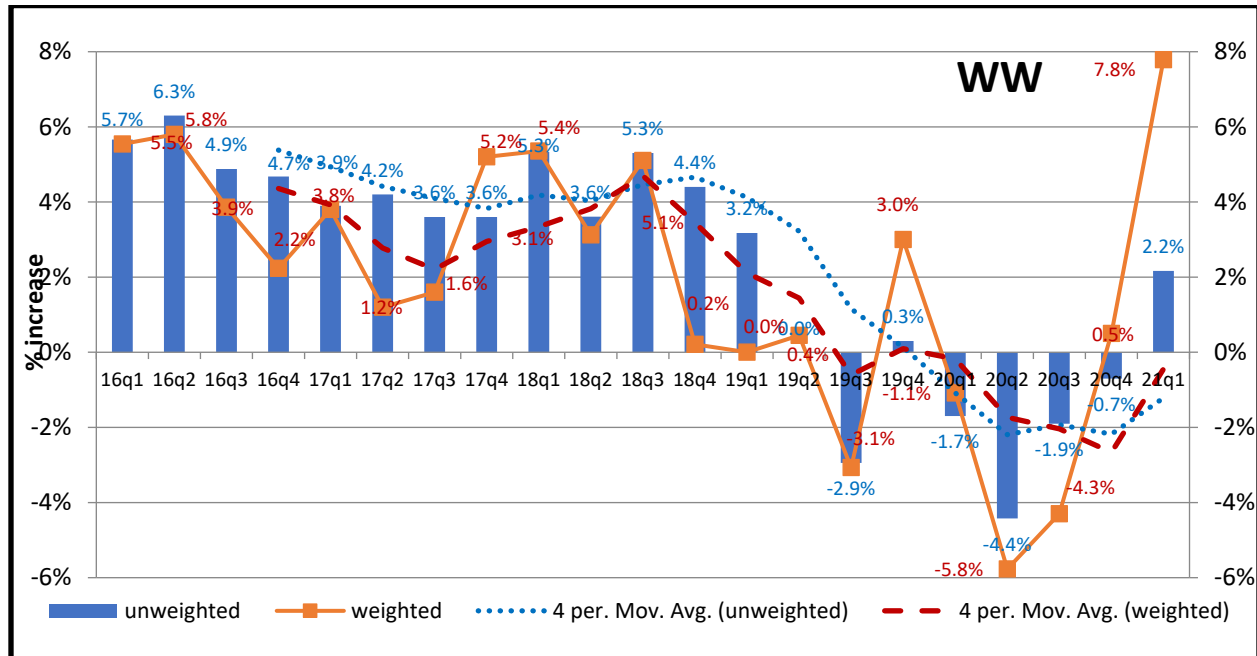
| EMEA | Rev | Prof | Live | Virtual | Self | Cert | Subs |
|--------------------|------|------|------|---------|-------|------|-------|
| Volume | | | | 8.0% | 6.3% | 2.1% | 5.5% |
| Revenue Unweighted | 1.4% | 1.0% | | 8.3% | 4.1% | 1.6% | 6.6% |
| Revenue Weighted | 3.5% | 0.2% | | 11.5% | 11.4% | 3.7% | 10.9% |



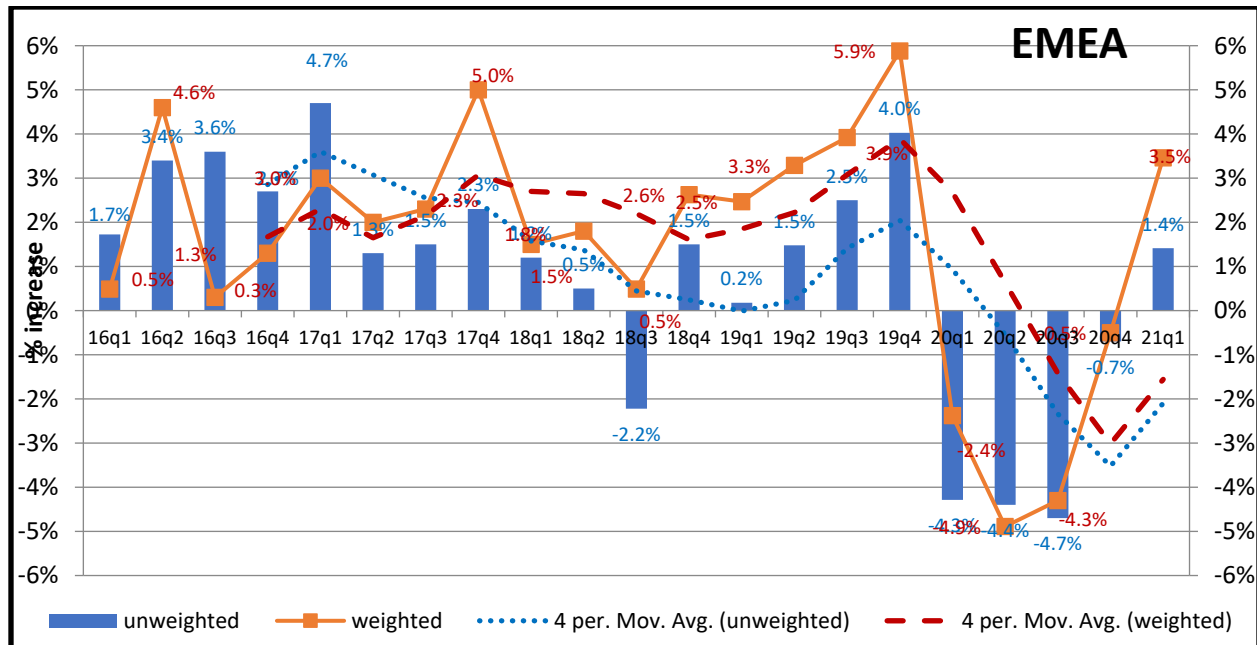
The significant revenue increases for 21q1 compared to 20q1 are virtual instructor-led, self-study and subscriptions. Live instructor-led simply did not happen.

[Back to top](#)

Overall Training Revenue



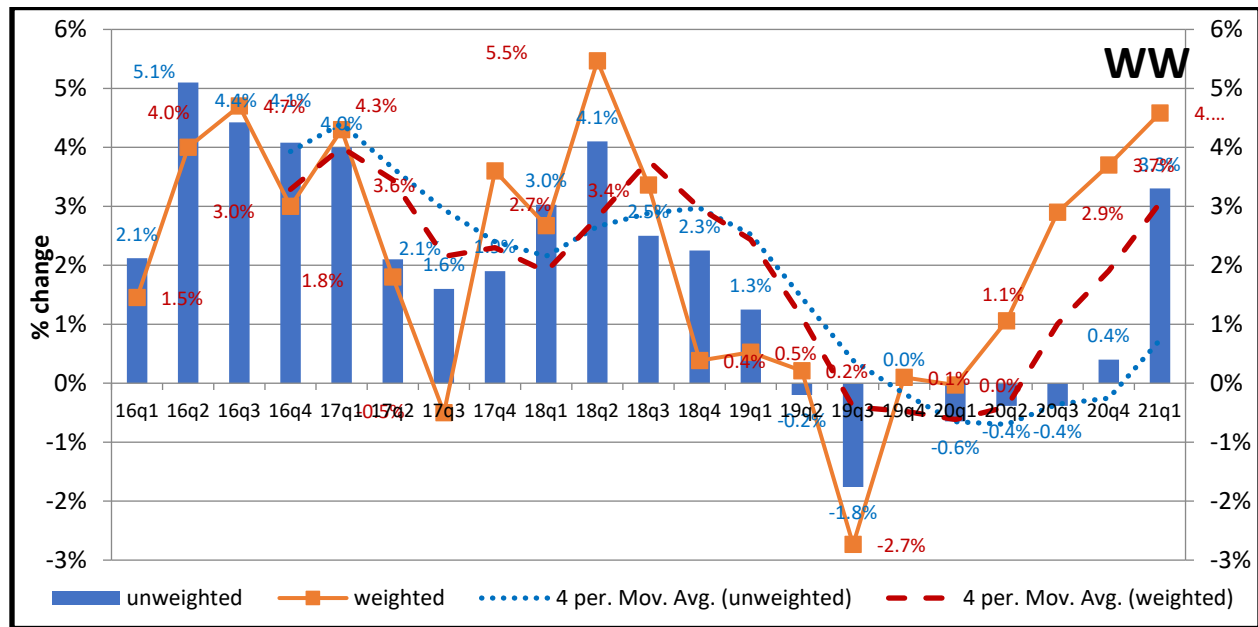
The unweighted total training **revenue** increase for 21q1 (u=18, f=4, d=8) was 2.2%. However, the weighted total training **revenue** increase was 7.8%. The 4-period moving average is currently showing just under flat for both unweighted and weighted.



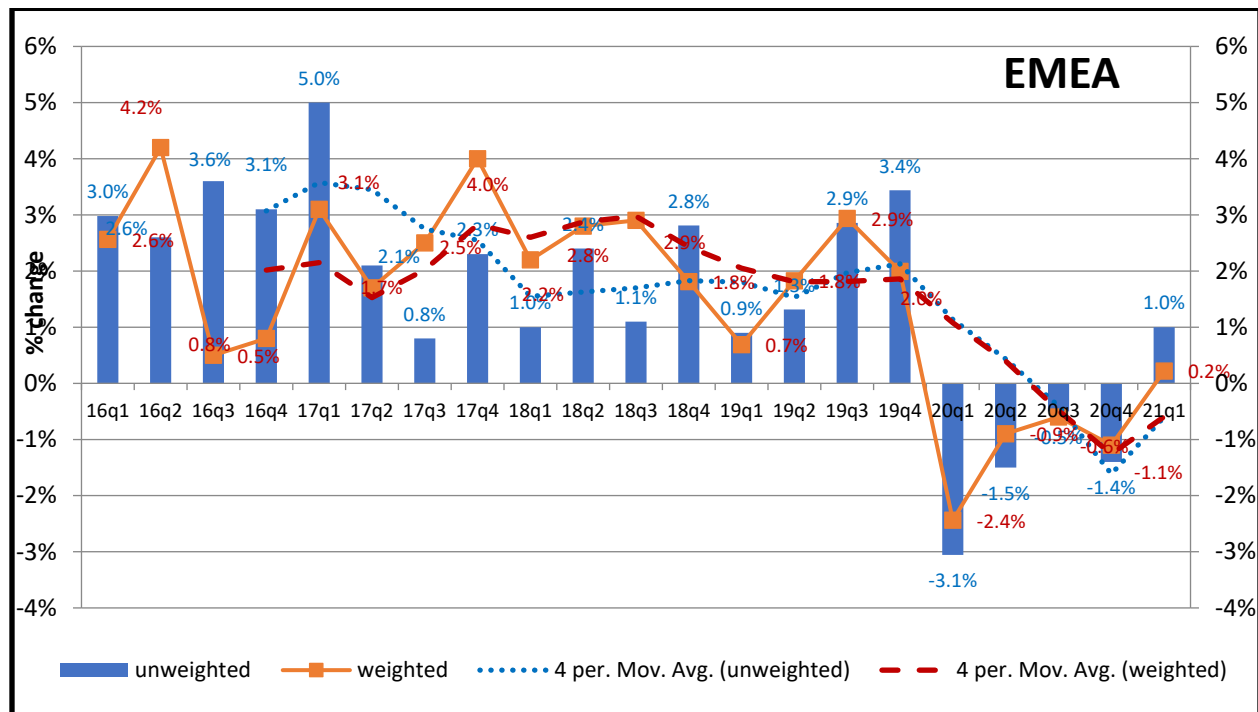
The unweighted total training **revenue** increase was 1.4% in 21q1 (u=15, f=2, d=6). When considering the weighted numbers, it was 3.5%. However, the weighted trendline shows a decrease of 1-2% over the last four quarters when size of company is considered.

[Back to top](#)

Training Profit



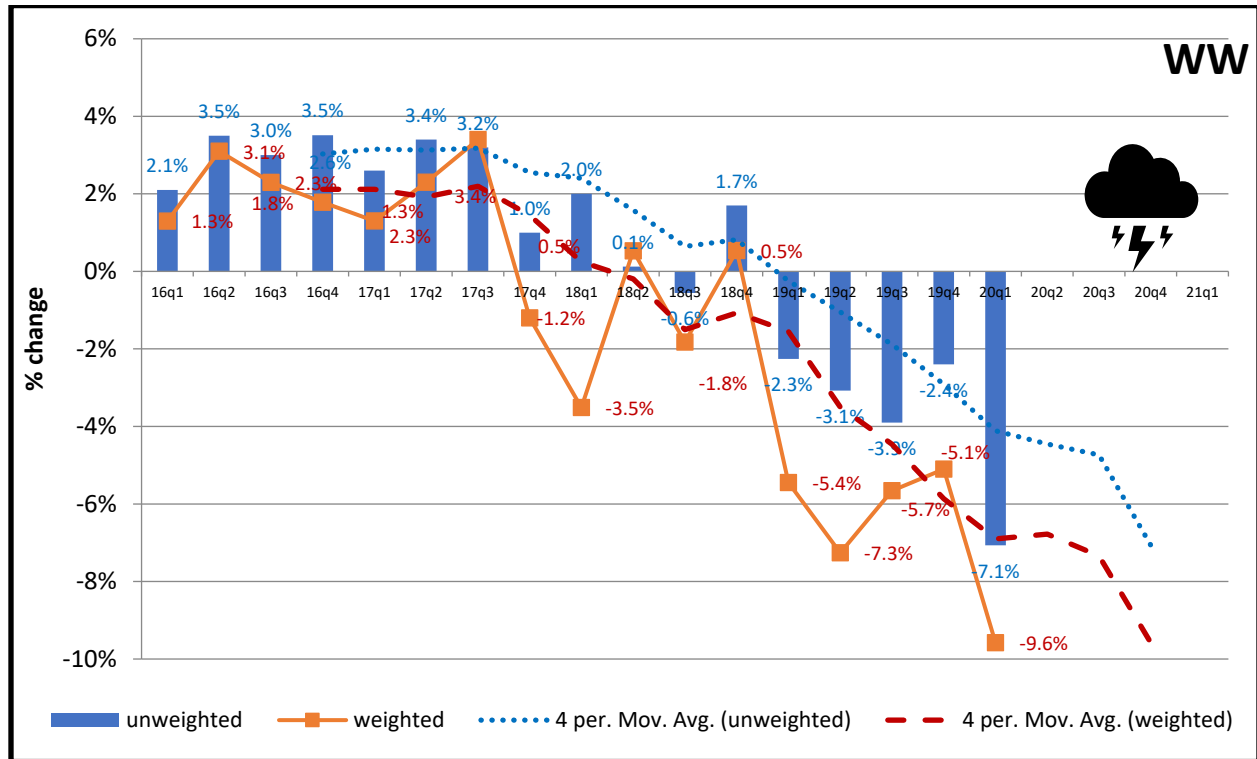
Training profit in 21q1 ($u=21$, $f=5$, $d=2$) increased 3.3% for unweighted and 4.6% for weighted. The training profit weighted trendline has recovered to positive 3%.



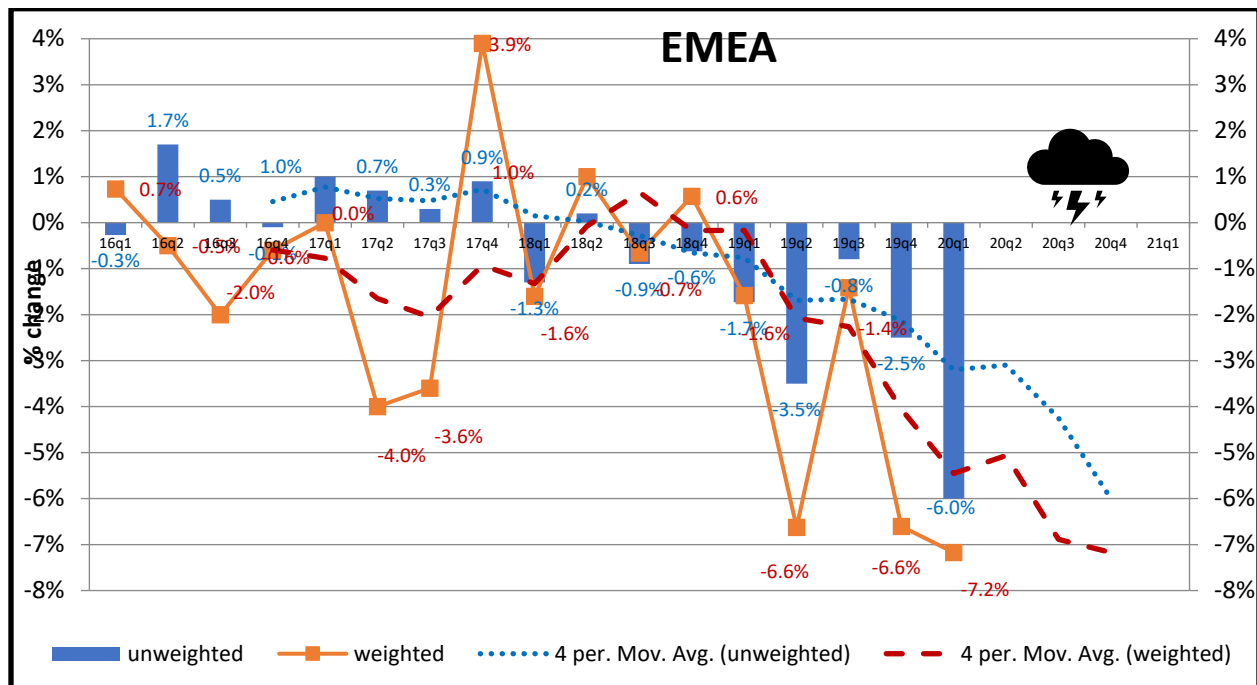
The unweighted total training profit rose 1.0% in 21q1 ($u=10$, $f=4$, $d=6$). And, with the weighted numbers, there was also an increase of 0.2%. The weighted trendline shows an ongoing profit decrease of just under 1% for the last four quarters when size of company is considered.

[Back to top](#)

Live Instructor-led Training



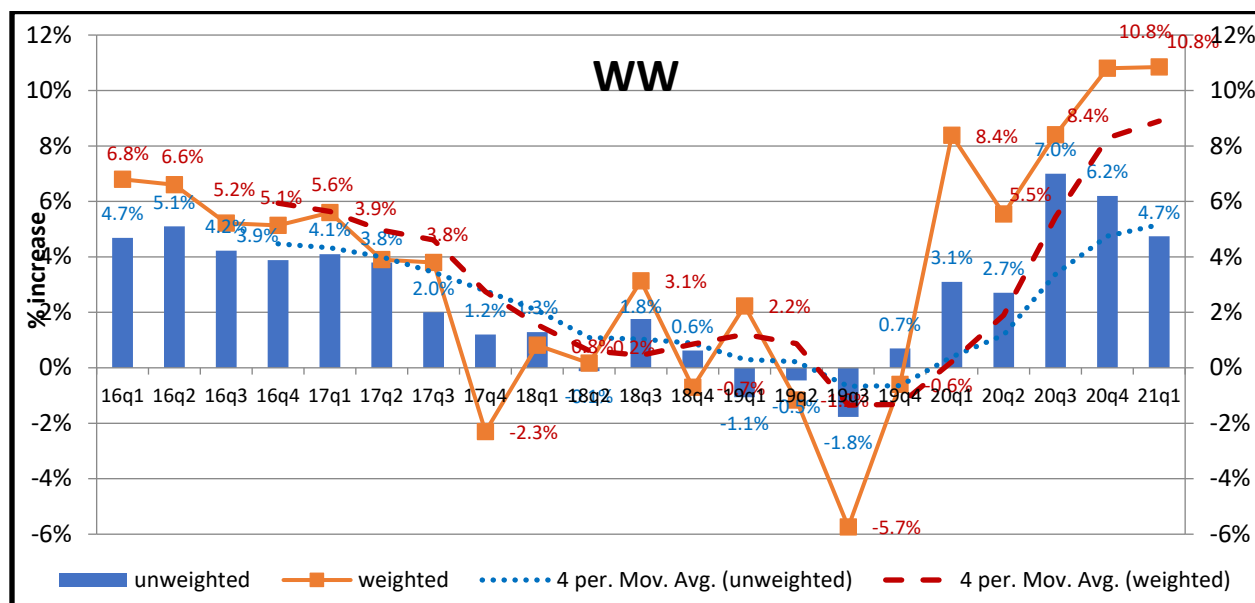
There was no live ILT delivered in 21q1.



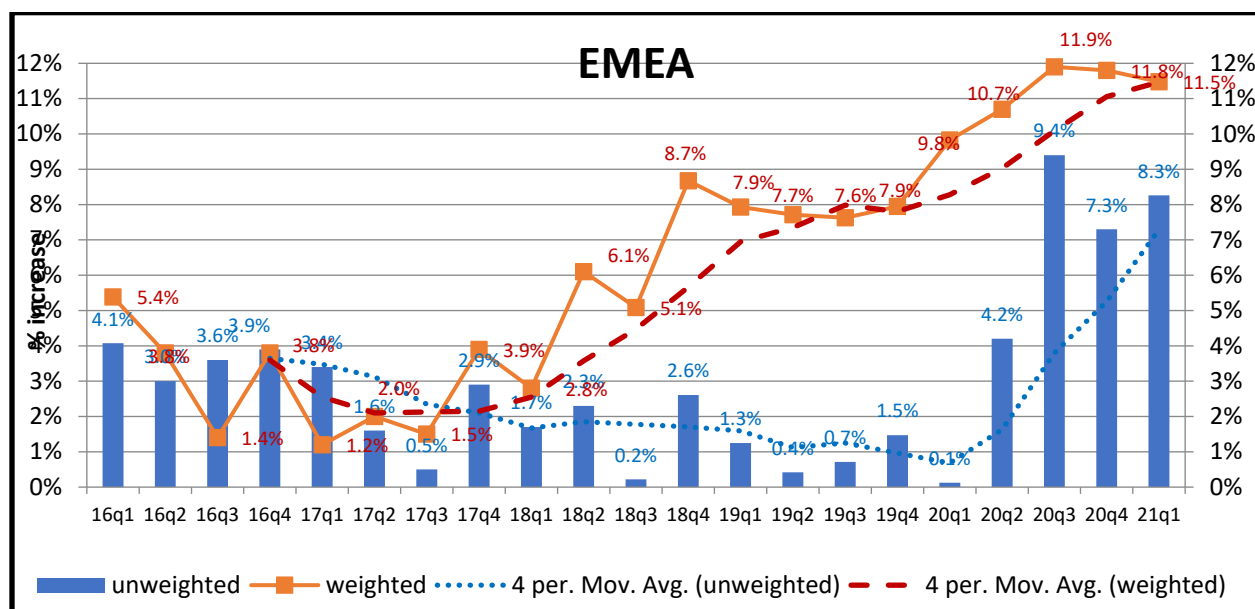
There was no live ILT delivered in 21q1.

[Back to top](#)

Virtual Instructor-led Training



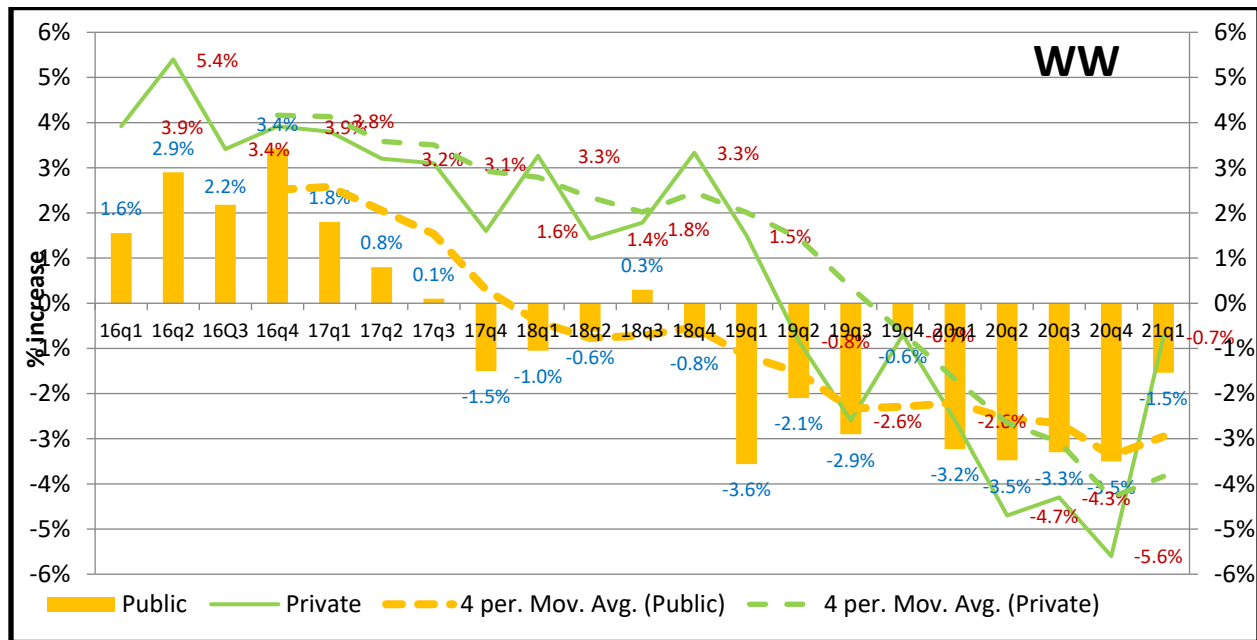
Virtual classroom has continued its upturn. The unweighted virtual classroom **revenue** increase for 21q1 (u=20, f=4, d=5) was 4.7%, with the weighted **revenue** increase at 10.8%. The increase in **volume** was 4.8%. The 4-period moving average for weighted is 9%, up from 3% in 2017 and -1% in 2019. COVID-19 sparked this recovery.



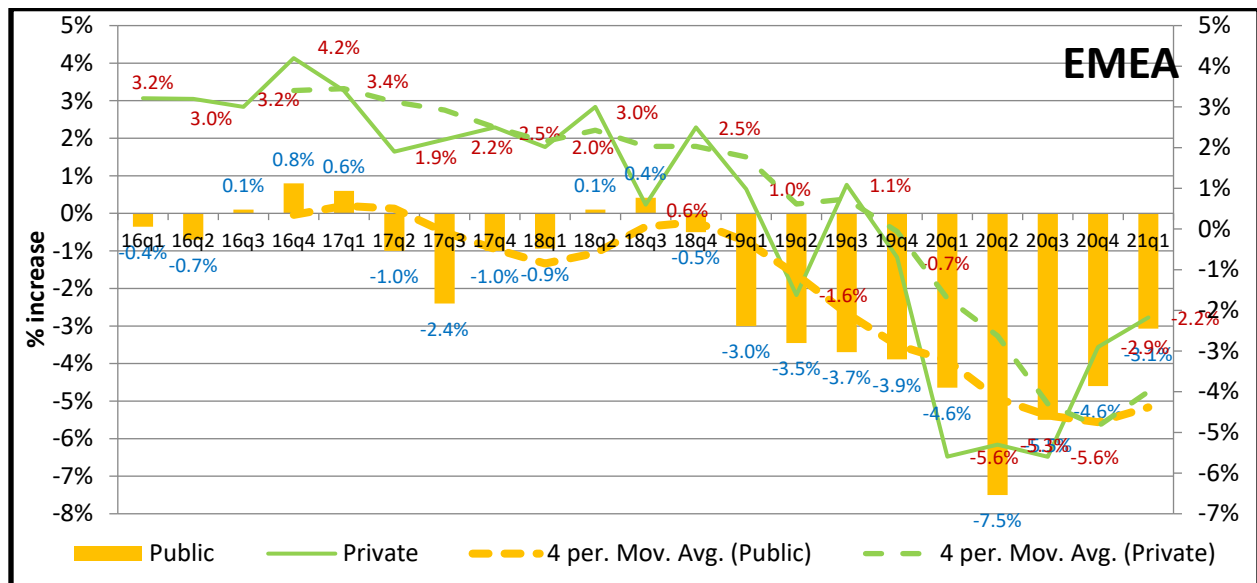
To compensate, the VILT increase was even greater than before. The unweighted 21q1 **revenue** increase is 8.3% (u=19, f=4, d=1) and the weighted increase 11.5%. The increase in **volume** was 8.0%. The weighted trendline shows an ongoing VILT increase of over 11% when size of VILT revenue is considered, but it was 3-4% in 2016 and 8% in 2019, having been 1% in 2014.

[Back to top](#)

Public v Private Unweighted



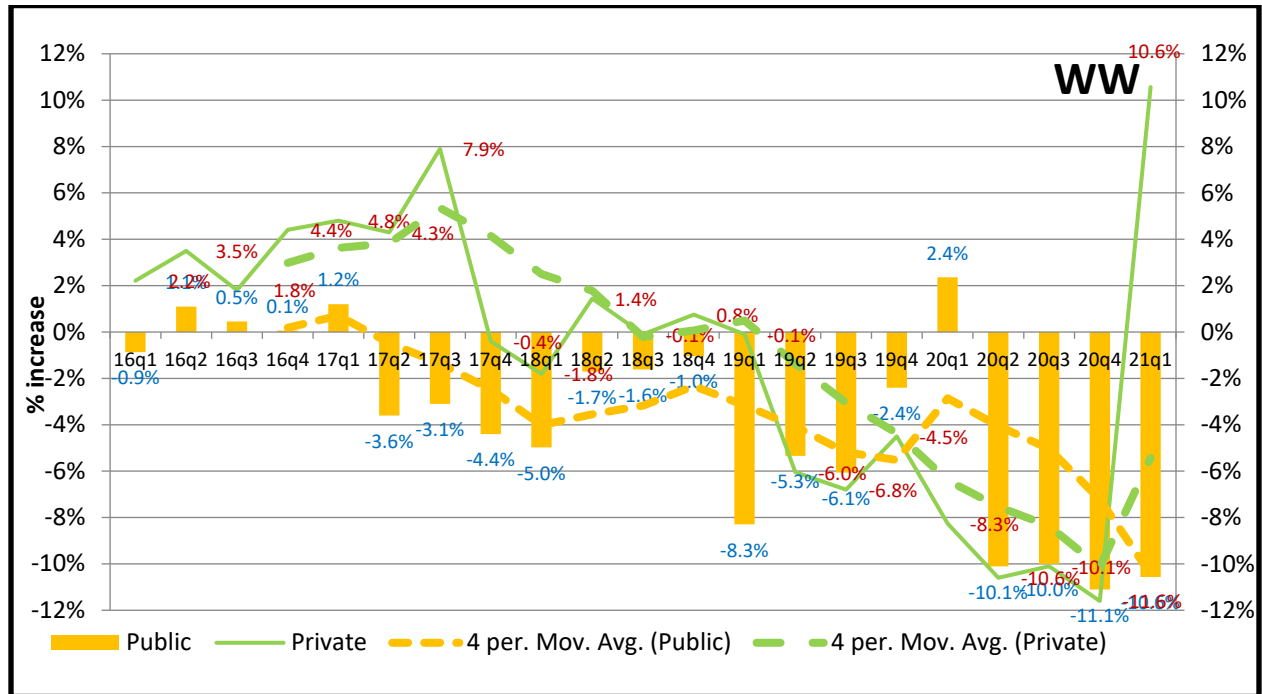
We include questions on public classes and private classes. Unweighted public **revenues** have decreased in 21q1 by -1.5% and private decreased by -0.7%. The decrease in **volume** was -1.1% for public and -1.6% for private. The trendline has dropped to negative 3-4% for public and private. (Note that public is u=9, f=8, d=9 and private u=9, f=9, d=9.)



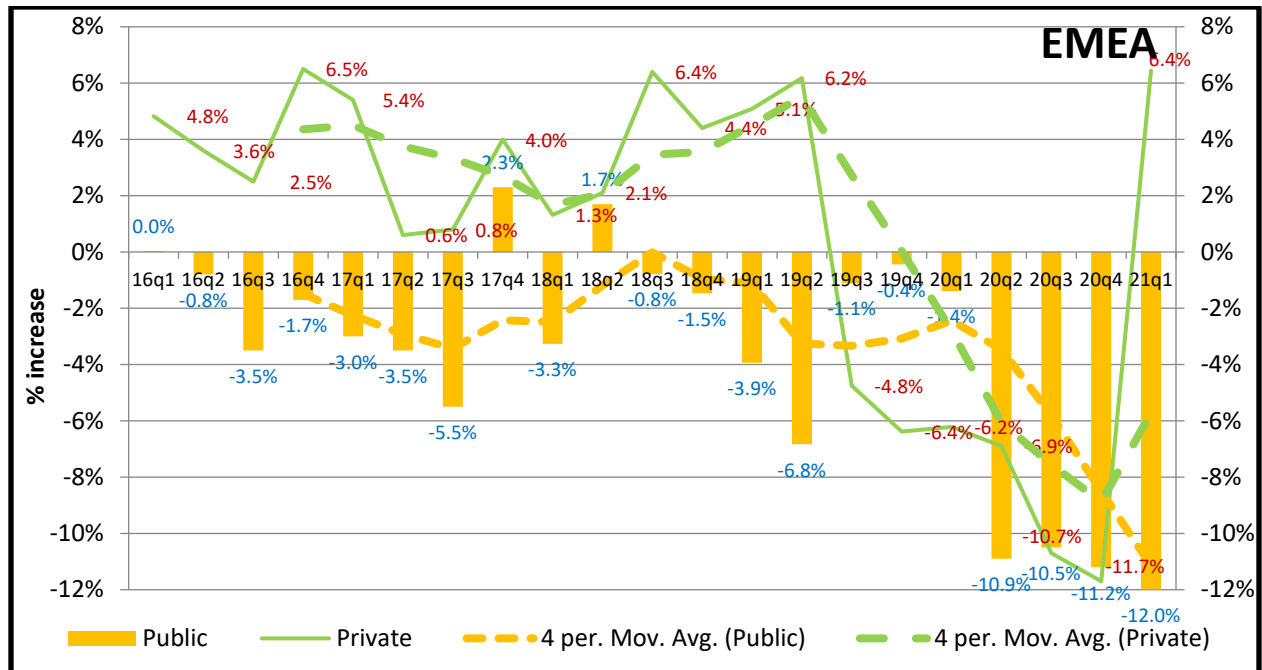
We are now asking you to forecast both public (u=6, f=3, d=13) and private (u=7, f=5, d=11) classes and have enough history to show that private classes show **revenue** is falling 5-6% over the last four quarters, and public classes are also decreasing 6%. **Volumes** decreased -4% for public and -4% for private. This shows unweighted values.

[Back to top](#)

Public v Private Weighted



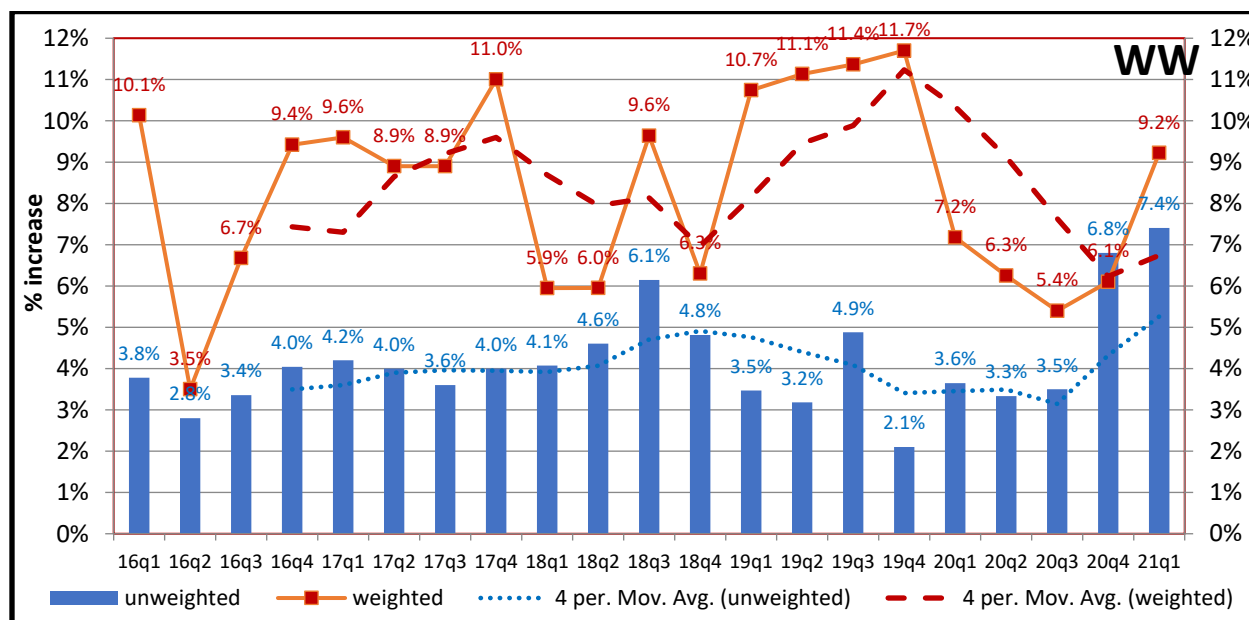
When weighting is considered, the changes are more dramatic. In 21q1, public **revenue** has decreased by -10.6% but private **revenue** increased 10.6%. The 4-period moving average is negative 10% for public and negative 5% for private.



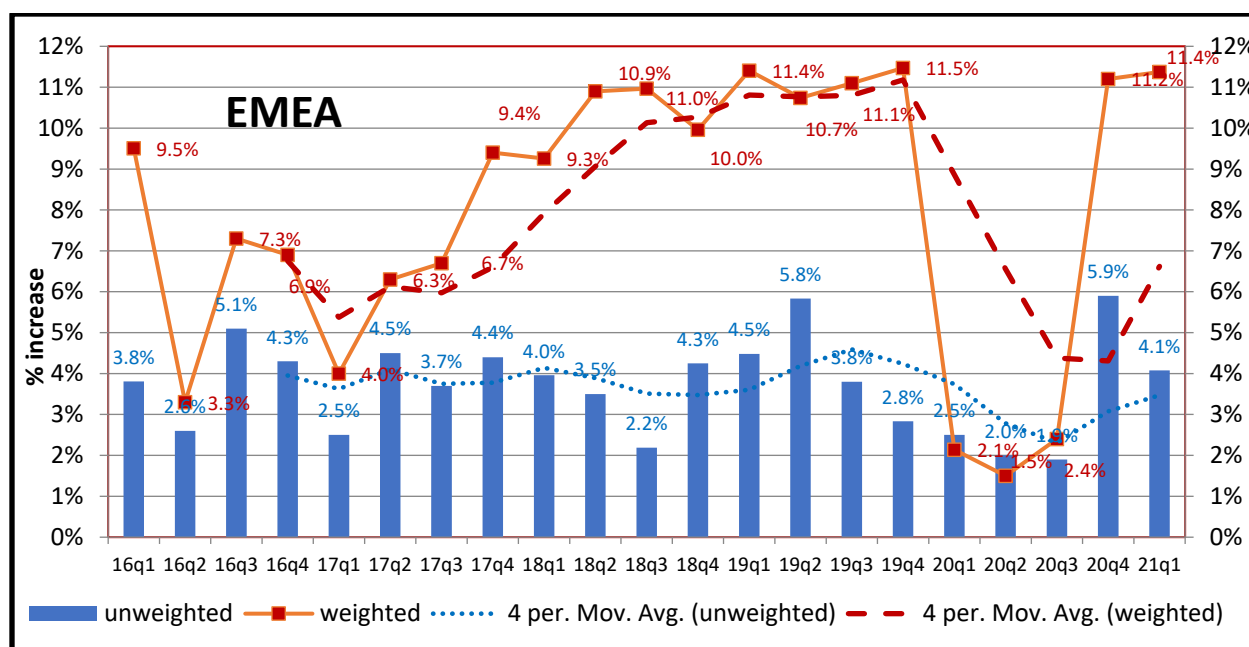
Weighted values have the **revenue** trendline for public showing negative -11%, private negative -6%.

[Back to top](#)

Self-Paced



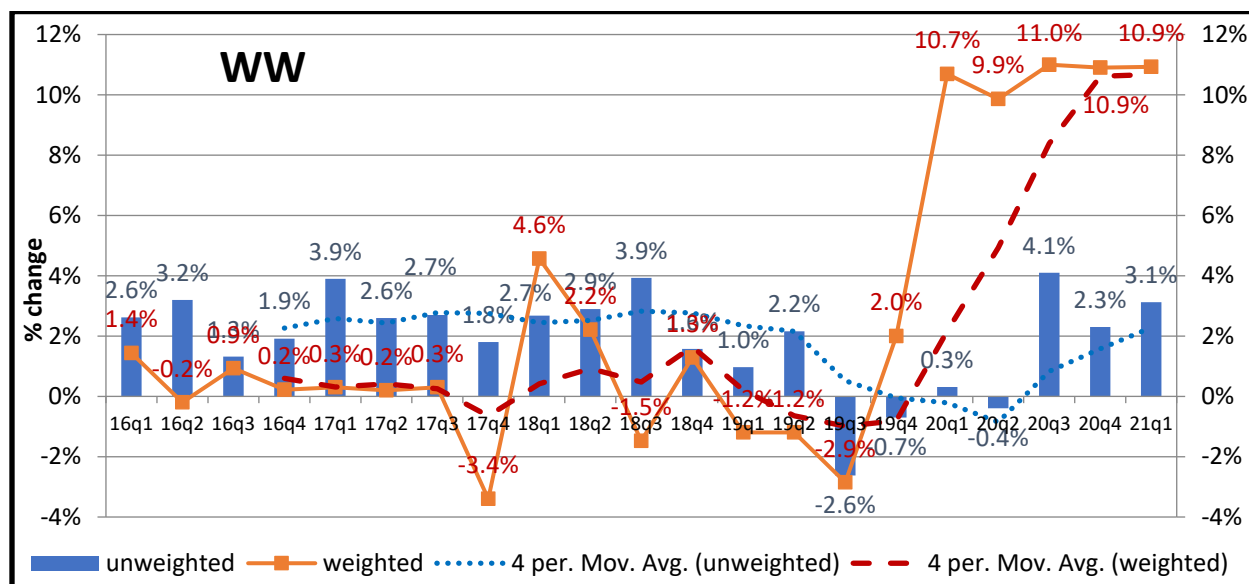
The unweighted self-paced **revenue** increase in 21q1 (u=22, f=3, d=2) was 7.4%. However, the weighted self-paced **revenue** increase was 9.2%. The increase in **volume** was 7.2%. The 4-period moving average shows 7% for weighted.



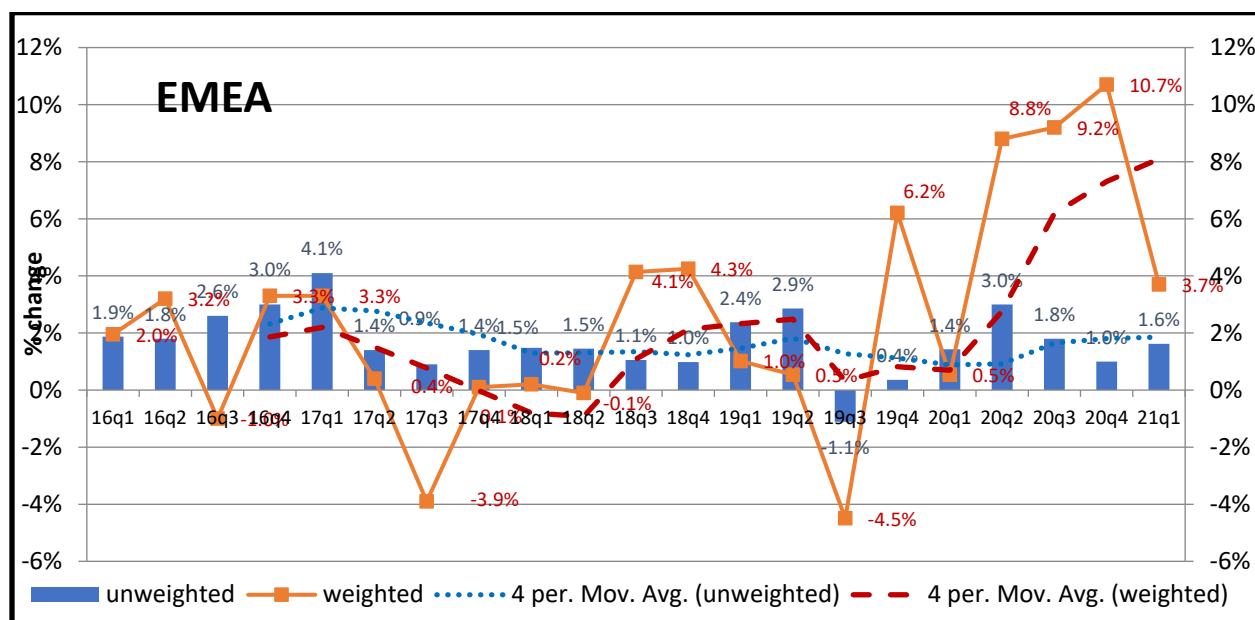
The results for 21q1 (u=14, f=2, d=3) were 4.1% increase unweighted and 11.4% increase weighted. The increase in **volume** was also 6.3%. Larger companies again have a significant effect on these averages this last quarter. The 4-period moving average is 6-7% increase for weighted, with companies back to charging.

[Back to top](#)

Certification



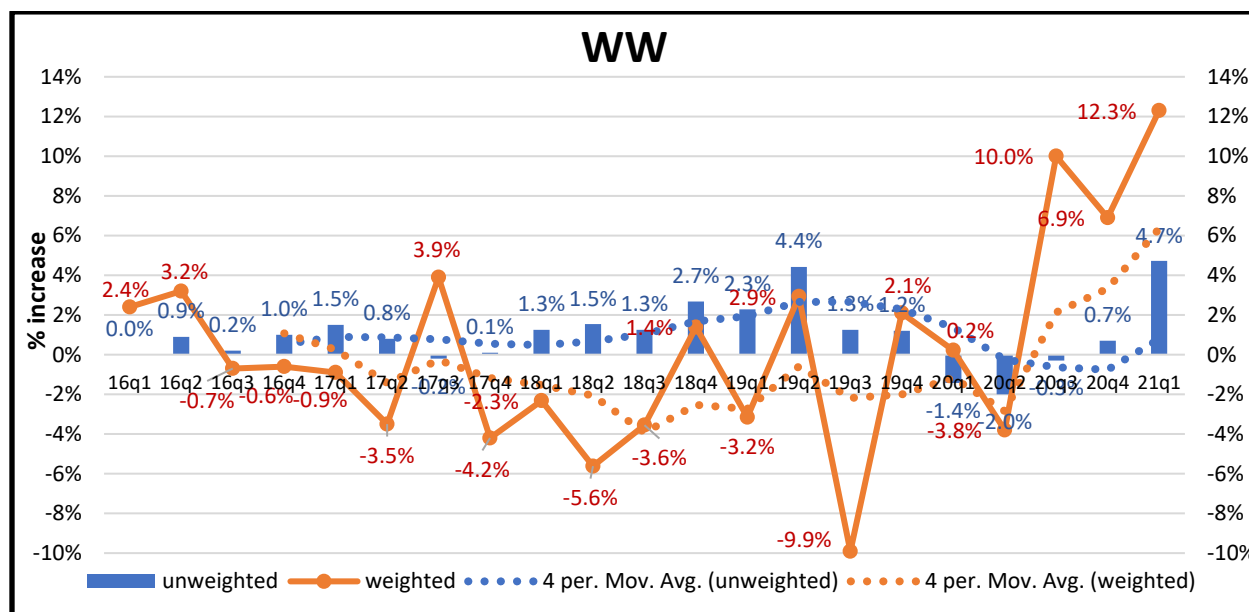
The unweighted certification **revenue** increase for 21q1 (u=11, f=8, d=5) was 3.1%, and the weighted certification **revenue** increase was 10.9%. **Volume** was an increase of 2.1%. The weighted 4-period moving average is 11%. Customers and partners may be taking advantage of the pandemic for re-skilling and certification testing.



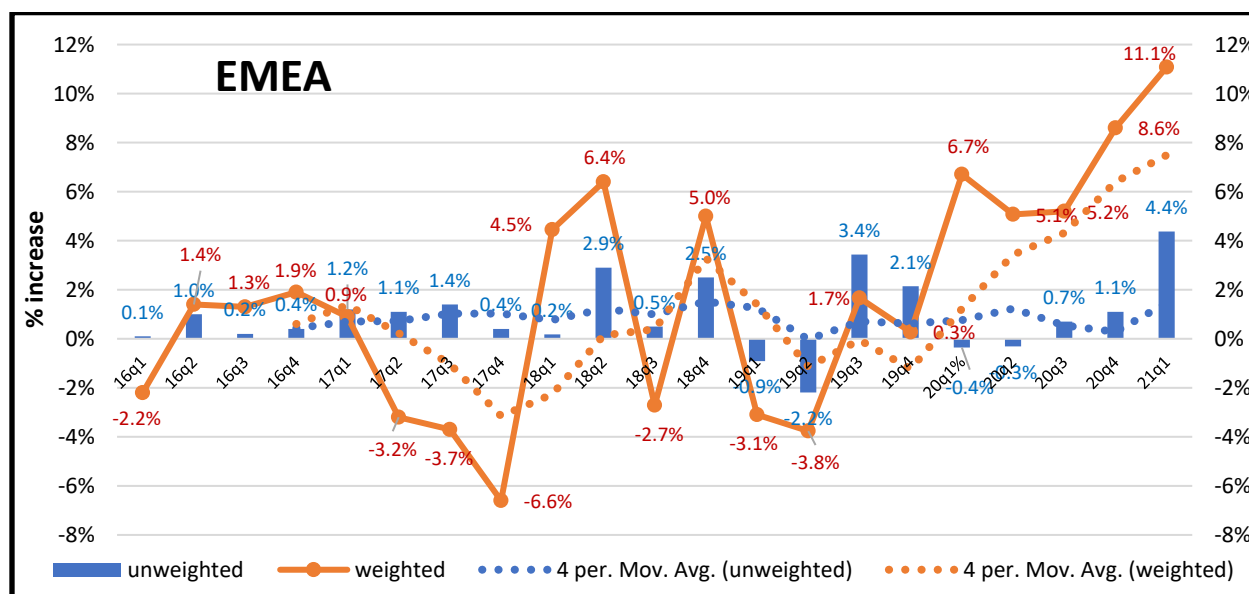
Certification has shown several swings over the last four years. However, the latest large increase has probably resulted from the push by partners and customers to certify more staff. The increase in **volume** was 2.1%. The **revenue** increases for 21q1 (u=9, f=4, d=4) are 1.6% for unweighted and 3.7% when weighted. The weighted 4-period moving average is 8%.

[Back to top](#)

Learning Consulting



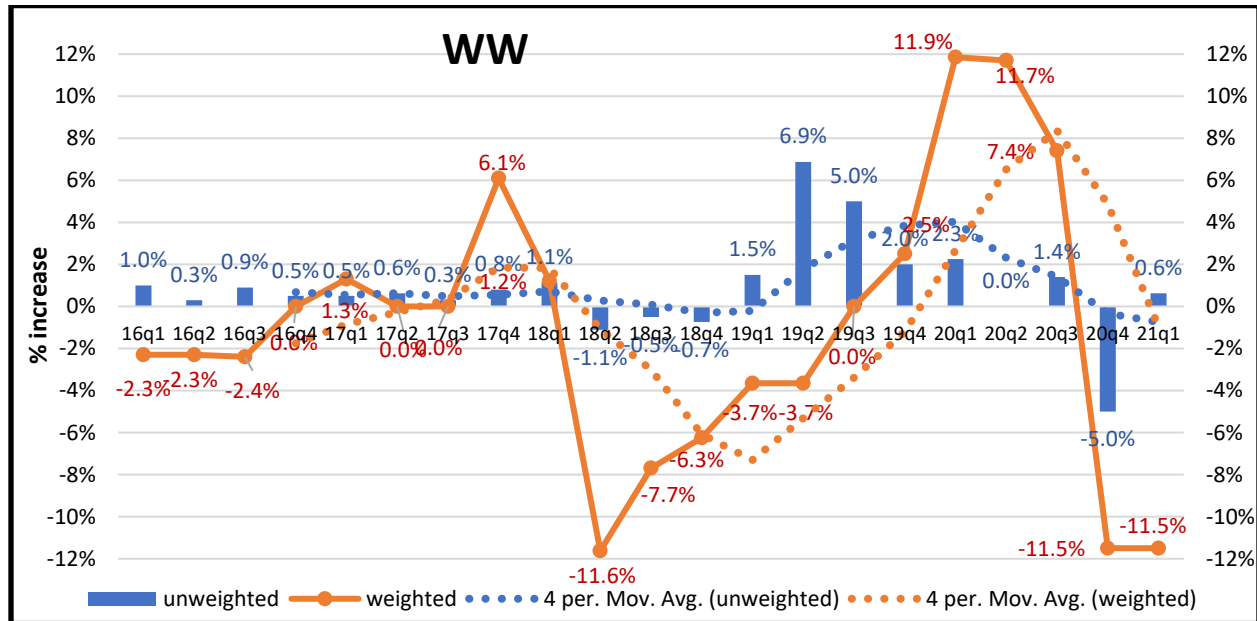
We now have over five years reporting this area. Weighted scores have been volatile and show a moving average of positive 6%. The increase in **volume** was 1.3%. The **revenue** changes for 21q1 (u=5, f=4, d=0) are 4.7% for unweighted and 12.3% when weighted.



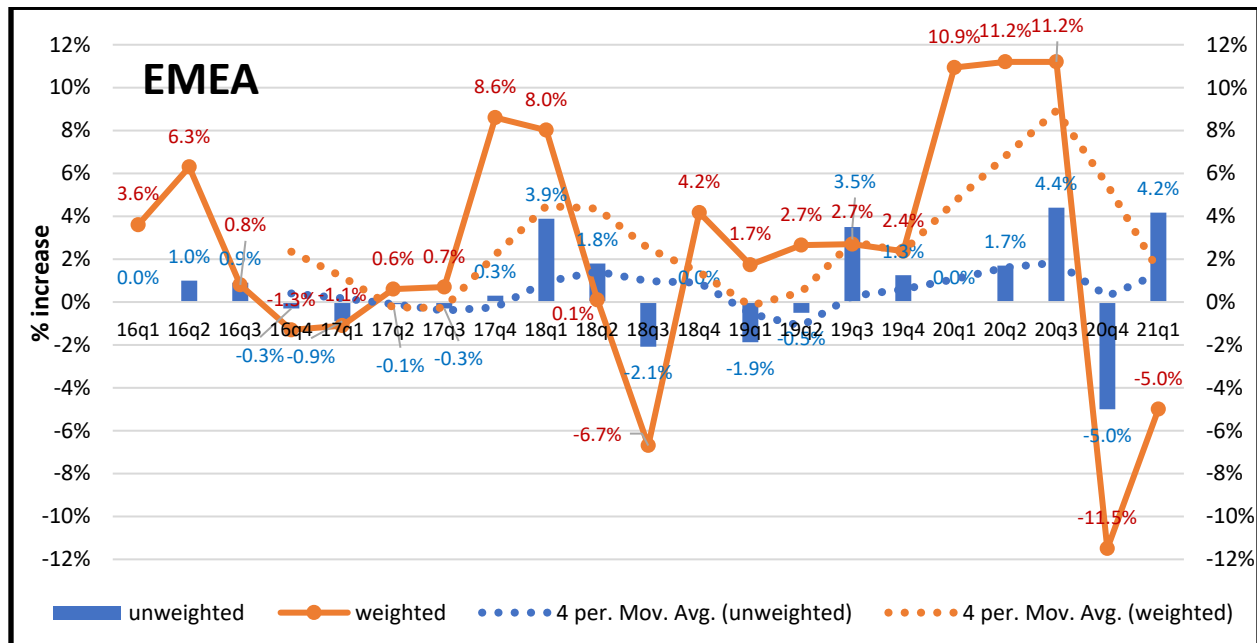
We now have five years reporting this area. In that period, the unweighted scores have largely remained flat. However, weighted scores have moved dramatically. The **revenue** increase for 21q1 (u=4, f=4, d=0) is 4.4% for unweighted but 11.1% when weighted. **Volume** increased 0.8%. The current four-period average for weighted is 7% increase.

[Back to top](#)

Learning Technologies



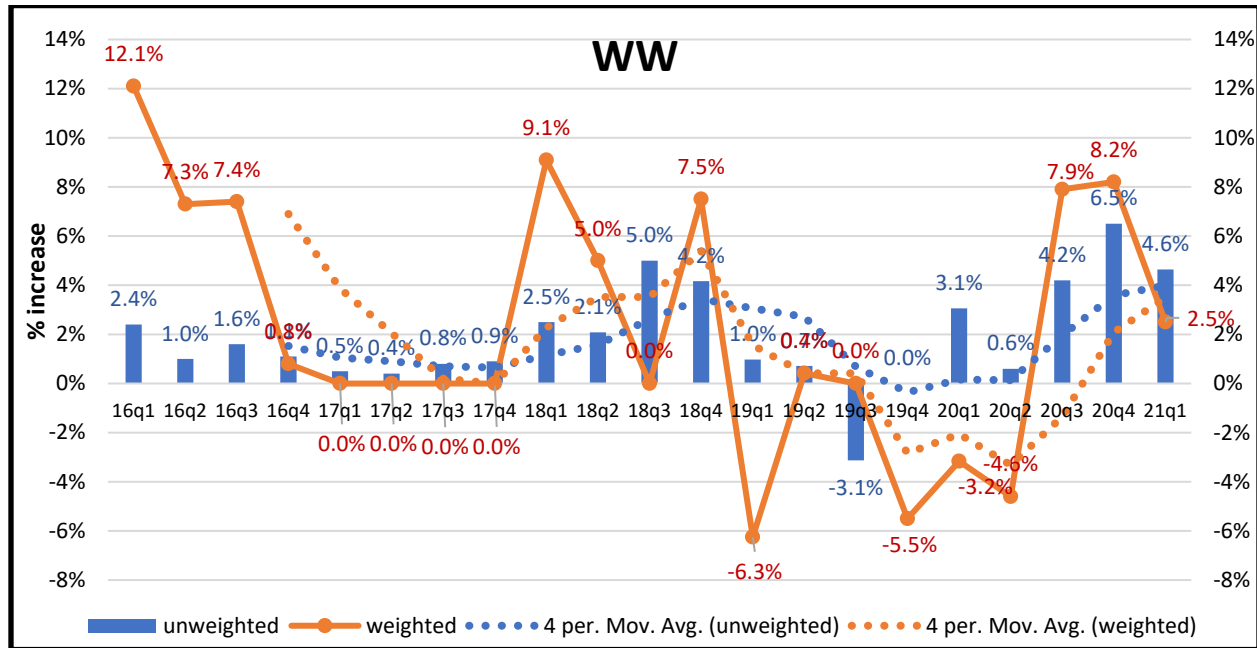
We also now have over five years reporting this area. The trendline for weighted scores has dropped to flat following a steep drop in revenue, maybe caused by no onsite work allowed. The **revenue** increase for 21q1 (u=3, f=4, d=1) was 0.6% for unweighted and a decrease of -11.5% when weighted.



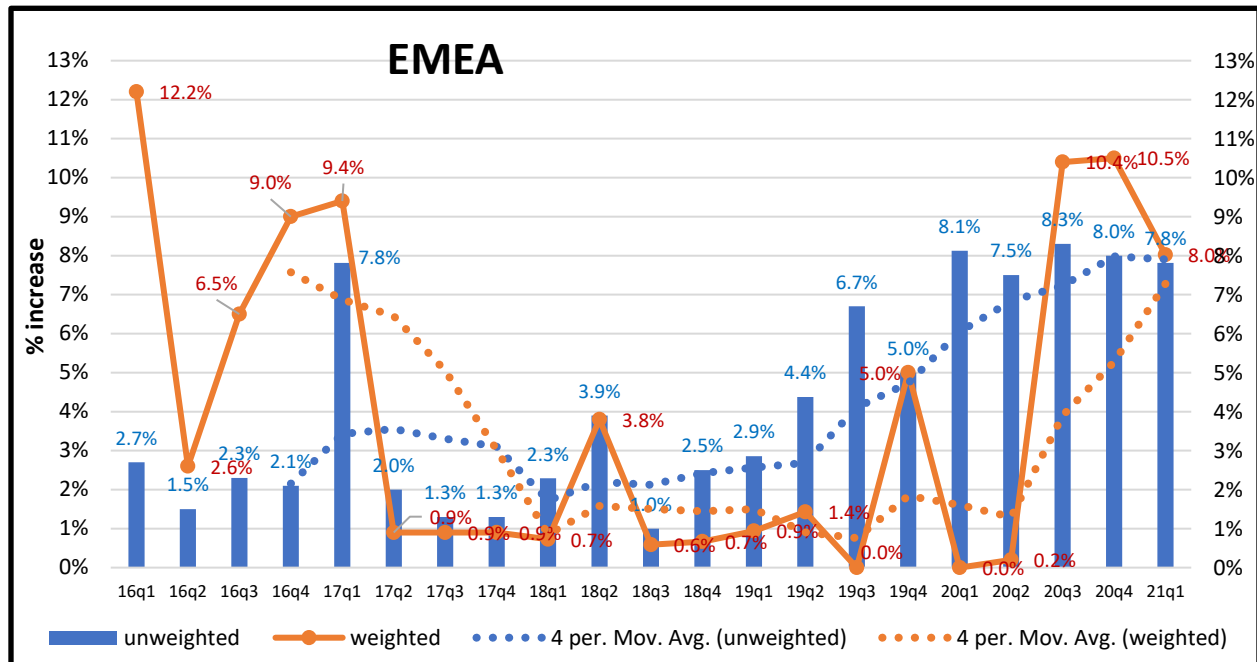
We also now nearly five years reporting this area. In that period, the unweighted scores have recently shown a little volatility. The **revenue** increase was 4.2% for 21q1 (u=1, f=2, d=0) for unweighted and a 5.0% decrease when weighted. The trendline for weighted is down to positive 2%.

[Back to top](#)

New Learning Modalities



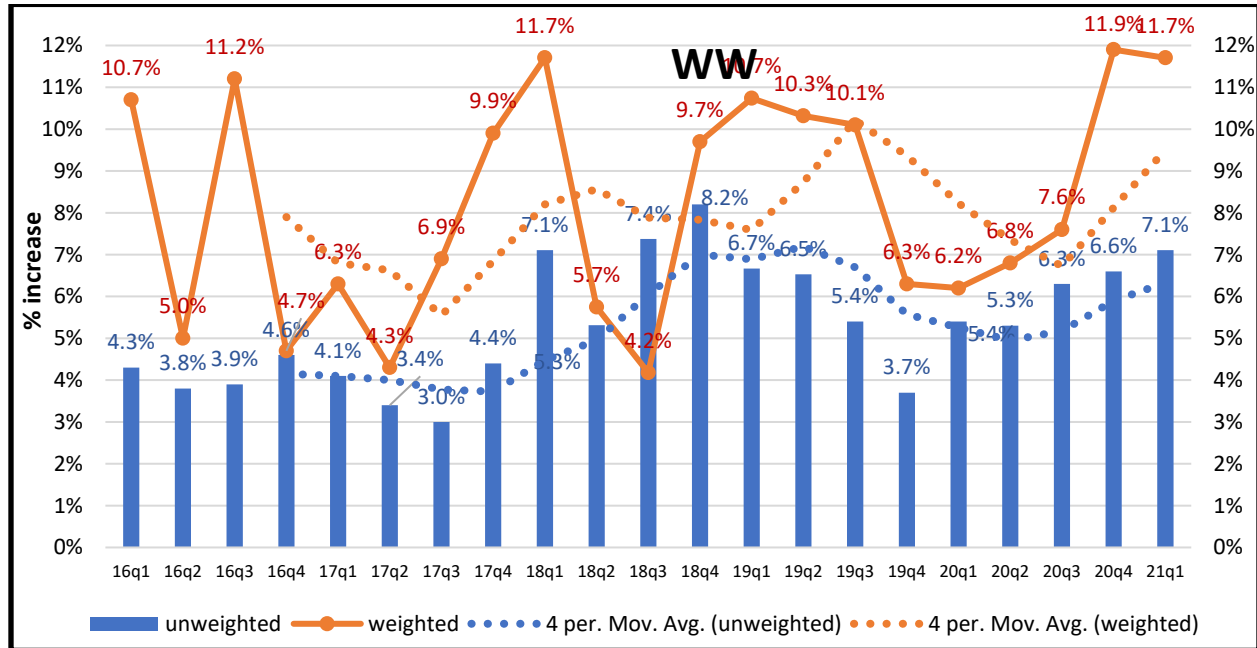
We now have 21 quarterly reports. In the last 12 months, the trendline for unweighted scores is showing positive 4% and for weighted scores positive 3%. The increase in **volume** was 1.5%. The **revenue** for 21q1 (u=5, f=2, d=0) is 4.6% for unweighted and 2.5% for weighted.



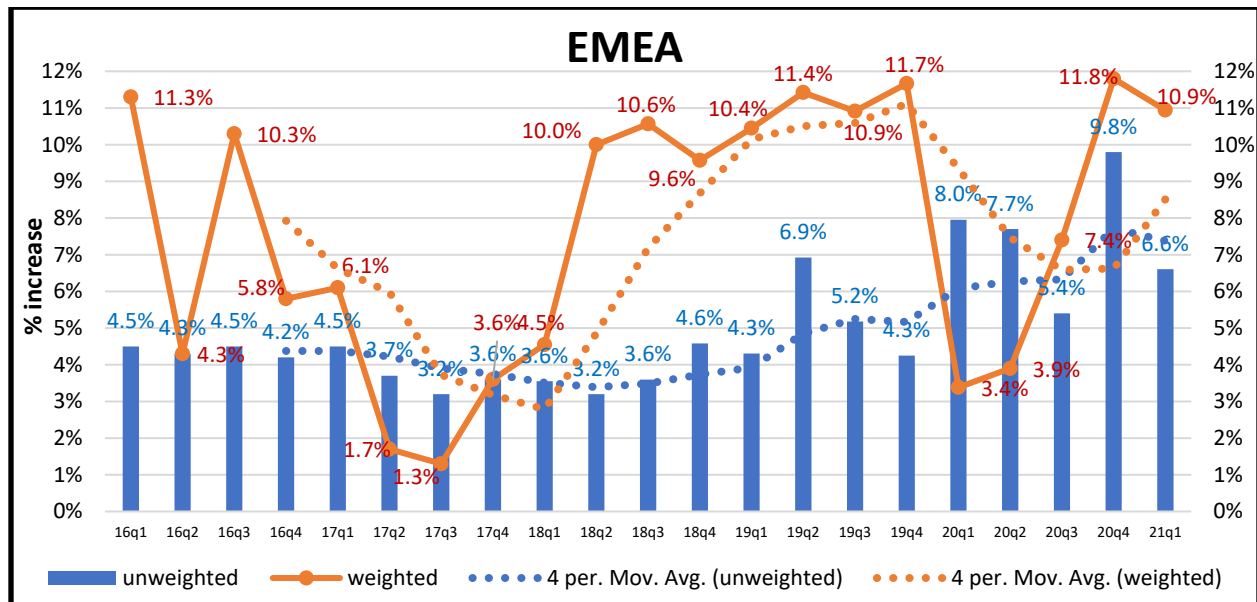
The unweighted trendline is 8%, while the weighted trendline shows 7-8%. The **revenue** increase for 21q1 (u=7, f=1, d=0) is 7.8% for unweighted and 8.0% for weighted. The increase in **volume** was 3.1%.

[Back to top](#)

Subscriptions



We also have 20 quarterly reports here. Currently, the unweighted trendlines show a 6-7% increase and weighted 9-10%. The **revenue** increases for 21q1 (u=14, f=5, d=0) are 7.1% for unweighted and 11.7% for weighted. The increase in **volume** was 5.1%.



The unweighted trendline is 7-8%, with the weighted trendline 8-9%. The **revenue** increases for 21q1 (u=11, f=1, d=2) are 6.6% for unweighted and 10.9% when weighted. The increase in **volume** was 5.5%.

[Back to top](#)

Note: Comments in these four sections are in no particular order

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

| Worldwide | EMEA |
|---|---|
| VILT | EDC and Axon |
| Cloud (70% YoY increase) | Self-paced, VILT, Certifications |
| We only provide product training, so we don't have subject areas. | Legislative change (eg COVID Job Retention Scheme) |
| Our subscription revenue (new and renewals) continues to grow. Subscription contains self-paced, eLearning and low stakes certification. | Skill badges, self-paced labs and on-demand |
| IP Audio Essentials; ACS (VMS); Multisensors; Camera Interface; Perimeter protection; Inner area protection; Body Worn; IP Intercoms | Virtual Instructor Led - converted ILT classes to virtual - seen good take up. Subscriptions - new offering in Q3/2020 - continue to see take up - slower than I would like - working to educate product sales to attached learning subscriptions to deals. |
| VILT | VILT |
| Self-paced learning, online learning and hands-on labs. | Commerce and Marketing Cloud |
| Large growth in new VILT classes (converted from ILT); Growth in our new learning subscription offering in Q3 2020 (self-paced eLearning platform) | Data Engineering. VMware |
| Subscription becomes the go to market and has considerable growth. Virtual training at core, aligned with the current context and future customer expectations. | Public scheduled courses did well in Q1. Virtual training has been very well received and hoping to retain this post pandemic |
| Subscriptions | Digital Learning and Credentialing |
| New courses on new products... | It's generally the same - we're still providing training predicated on our core suite of software products. |
| We saw a large increase in the topics of email marketing, social media marketing, as well as our SaaS tools at HubSpot (CRM, Marketing, Analytics, etc.) | Virtual classes |
| Virtual Instructor-led Training classes | ITIL v4; Our ON-Demand learning subscriptions; Strong growth in Product and Support contract "attach" sales; strong growth in indirect ("channel") sales |
| Virtual Training due to COVID-19. Both basic and advanced courses. | Free partner training |
| Virtual | Industrial applications |

| | |
|---|--|
| Cloud-based products | Consulting - change management consulting services is the growth area and opportunity for increased revenues outside of the subscription business |
| Training classes sold bundled with Product sales ("Product Attach") grew 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. Our face-to-face training program is essentially suspended. Networking and Storage training increased dramatically y/y. Our most recently completed quarter was our strongest for the past 12 months, since the pandemic started. | Self Paced Learning Labs; Live Classroom (Partners |
| VILT Delivery and Demand for more VILT. Want VILT to go deeper as well. | Learning Portal creation; Learning Subscriptions; Free e-Learning |
| We rolled out digital credential program for one of our product lines which resulted in a 300% increase in consumption of courses and learning paths related to those credentials | VT - 100% of ILT is VT based for the last year. Certification rev picked up since offering remote proctored (from home) exams. Subscriptions up 30+% YoY |
| Free partner training | Virtual classrooms |
| VILT | None. Only addition was subscription which is increasing. |
| Training consulting hours and customized training | Subscriptions; public and private improved |
| Partner training and certification | |
| Public Virtual Classes | |
| Installation/provisioning topics, operations, advanced technical topics, best practices | |
| Advanced Developer Training | |
| Subscriptions | |
| Subscriptions continue to grow, with COVID complete shift to Virtual Online occurred in all geos. Accelerated trend from previous 5-10 years. | |
| Core technology Database FastTrack for DevOps | |

[Back to top](#)

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

| | |
|-----------------------------|----------------------------|
| Worldwide | EMEA |
| Instructor-Led Face to Face | Cloud |
| PowerCenter | Face to face onsite/public |

CEdMA WW Training Market Barometer

| | |
|--|--|
| We only provide product training, so we don't have subject areas. | Dedicated onsite training including certification journey programmes |
| Network Video Fundamentals and certification; VMS Audio | ILT Live/in-person public classes - we don't plan to run any more public ILT classes, removed from price books. The only ILT classes we run now are private. |
| In-Person | Public ILT |
| Live classroom (in-person) | Private courses - decline in ad hoc requests for these |
| Public ILT live/in-person classes not offered anymore - leave to partners. Private ILT still offered. Certifications - overall down due to impact of Covid on the Academic institutes (student User Certifications). | Live classes |
| Live training and private sessions | Linux and Microsoft |
| Instructor Led | Paid-for customer training |
| No return to in person yet..... | Games applications |
| Firewall | Traditional pay per seat offerings - as expected; Subscriptions - not volumes but revenue as moved from a paid for subscription to an inclusive model |
| Public (open) enrollments - F2F training - remains near zero due to impact of Covid-19Linux training has declined significantly, as has certain of our virtualization trainings. | Private Onsite |
| Live onsite Classroom Training. | Public Schedule classes Onsite (single organisation) classes |
| 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. | Open Enrollment/public scheduled live classes since March 2020 (thanks to COVID-19). All cancelled and converted to VT |
| Paid-for customer training | Certification. |
| Public schedule classes in a classroom | Private classes and some virtual |
| ILT - non-existent; Moving traditional services revenue over to SaaS model, subscription net new IMSA is flat | Classroom training |
| Private Onsite | |
| Basic operations | |
| Foundational Administrator Training | |
| None, growth is 25-30% in all segments at present. | |
| Private Onsite Training went to zero with COVID; Public Classroom Training went to zero with COVID | |
| Search, Analytics and Graph | |

[Back to top](#)

What were the two greatest challenges you faced in running your business in the last 3-6 months?

| Worldwide | EMEA |
|--|--|
| Impact of Covid | Moving forward with specific regions, eg ME, EE |
| Limited training budgets and ensuring customer satisfaction in virtual courses when they would have preferred in-person. | Low volume participation across customer base who all want individual customer training |
| Turn-over in department leadership; Difficult to get data, especially historical | Covid 19 impact |
| Staying on top of our monthly parent product release and related new features. | Attracting customers to attend free light-touch learning (webinar/elearning); Pace of change in legislation impacts our business, we must review and build to fast timescales (Brexit, Construction law changes, Covid law changes etc) |
| Lack of demand on training | Covid-19: pivoting to 100% virtual and online proctored certification |
| In person Training; Travel | Still working to convert remaining ILT classes to VILT. Educating product sales to add our new learning subscriptions to deals |
| Still recovering from COVID - uncertainty as to when/if to return to in-person delivery and the best way to scale in an unknown world | No dedicated education sales team; Low education sales attach rate |
| Prove the value of training to overall company revenue and education services results. | Managing through a very volatile climate with many individuals, internal and external in a very stressed mind set |
| Still in the process of converting remaining ILT classes to VILT. Encouraging product sales to attach new learning subscriptions to deals. | Over utilisation. Maintaining instructor work/life balance |
| Huge team expansion, frequent product release cycles | New sales are lower than usual, currently using Prepaid credit but impact will be felt eventually. |
| Achieving plan in the context of COVID-19 Converting International business to subscription offering | CMS/LMS |
| Sales reps are not compensated for live training, so we have seen a steep decline in our private VILT business. The lack of subscription sales in APAC and EMEA. | Resourcing: Having shrunk the team last year as a result of C-19, there have been some challenges with scaling back up. Bookings: While revenue has recovered (partly from existing customers restarting their training engagements) new business bookings are remaining weak. |
| Updating eLearning and ILT classes around our SaaS product lines which change every two weeks. | COVID impact on ILT business; Budget restrictions for training |
| Matching the volume of credentials awarded as of last year at the same time. When everyone was in lockdown, everyone was looking to reskill. | Sharp business decline in our central European "Geo", due to local internal organizational |

CEdMA WW Training Market Barometer

| | |
|--|--|
| Another major challenge has been in delivering and getting the exec-level to understand our training and credentialing strategy for the year. | issues; Many countries still in recovery from pandemic |
| Running VILT classes in multiple time zones simultaneously. | Moving to freemium model is putting pressure on revenue; Increased pressure to delivery partner training for free |
| Working through hardware-based courses virtually. Resolving messaging between offerings. | Training services not recognised as ARR, therefore not given top priority; Training generating small amounts of revenue therefore deemed not important by sales people |
| Customers' ability to travel. | Only have 1 or 2 people booked on classes, do we run or cancel? Delegates waiting for face to face classes to resume. Companies not spending as much on Training |
| Eliminating all customer-facing training and shifting to having those classes delivered by our Authorized Training Center's; COVID forcing us to a 100% virtual (live-online) schedule. | Motivating customers to move back from free to fee given then rise in free material available Internal competition from Consulting, Customer Success etc. and their free webinars, lunch and learns etc. |
| Convincing customers in every Region that virtual training (either instructor led or On Demand) is a fully viable alternative to F2F. There remains a cultural reluctance in certain Geos to virtual training, though the longer the pandemic continues the more this reluctance lessens. Ramping up our Learning as a Service business as quickly as we think we can and should. LaaS customer adoption lags our targets at present but is growing. | Large reselling partners (GK, QA etc) have completely lost focus since COVID-19 started ... 50% YoY- make corporate sales and the consulting organization automatically attach training to product deals or Consulting projects. |
| Building a new training organization from the ground up and the demand for VILT that we don't yet have. | Extensions of training credits for customers waiting for F2F deliveries; Gaining support from marketing. |
| Our department was moved again to become part of a new department. The objectives of the new department fit more in line with our enablement objectives; however, the shuffle and adjusting how we work has taken a hit on team capacity. The second biggest impact has been COVID, we have had team members really struggling with the additional stress of home/work balance, childcare, etc. and so as a mental health measure have some team members on reduced hours right now. | Loss of instructors and bandwidth for German customers |
| Transitioning to subscription sales vs. public class sales | Free training offers |
| Moving to freemium model is putting pressure on revenue; Increased pressure to delivery partner training for free | |

| | |
|--|--|
| Lack of travel for instructors; Customers wanting in person vs. VILT | |
| Bringing new people up to speed; Increased customer demand | |
| Finding/hiring good candidates; Content Maintenance | |
| No Services Sales team. Reliant on Licence Sales team. Covid restrictions on travel. | |
| Accelerating our already in-progress move to full virtual or on-demand delivery, flat or decreasing headcount, decreased spending on training technology | |
| Sales; Transitioning content to new platforms | |
| Cornerstone LMS is not only dysfunctional when it comes to running a training business, the vendor's support is among the worst ever experienced; Training sales outside of the U.S. | |
| Postponement of classes due to COVID. 30% customers did not take the remote delivery option. | |

[Back to top](#)

Please add any other comments or observations you have on the state of the IT Training market

| Worldwide | EMEA |
|--|--|
| Continuous growth | ATP's core revenues heavily impacted as they switch to 100% virtual. |
| We can no longer (at least throughout 2020 and 2021) use trending to make assumptions to training demand. Lockdown and virtual work have shifted modalities and seasonal demand tremendously. In addition, as the tech market continues to move to hosted/subscription-based offerings, training needs to evolve to continue to support it. In software education, alignment to software license renewals is going to be key to continued customer success and education growth. | Customer booking later and later which can cause admin issues |
| Slow due to Covid19 | Now running a pure partner EDU model. |
| Introduction to the market - VILT | Seeing further signs of life; expect a strong fiscal Q3 and Q4 |
| i think it is very traditional and i would like to think about what should it look like in 10 years' time and prepare for that. | Big move to Self-Paced acceptance. |

| | |
|---|---|
| Customer requesting more virtual offerings or blended approaches; Digitalization and gamification becomes a main part of the learning methods | There remains less competition from grey providers as they don't have the set up to cope with online delivery. Customers have a shorter attention span for online learning. We have had to adapt courses for shorter days and more interactive sessions. It will be interesting to see if customers are willing to come back to classrooms. |
| We have pivoted (rather seamlessly) to virtual and On Demand delivery of all our training content. Our latest quarterly results are quite solid, indicating that we are continuing to recover/have recovered nicely from our Covid-19 trough last year. | Training revenues are still seeing a 20% drop in virtual classes, but ATPs have seen a 35% increase |
| The acceptance of VILT is much greater. | |
| We have seen an increase in taking advantage of the self-serve option for the same ILT courses which contain the same content. We removed the regularly scheduled sessions for VILTs. | |
| We are trying to reduce churn at a corporate SaaS level, and training is one way to help that cause | |
| Companies spending less on Training budgets. | |
| Digital training subscriptions; JIT modular training; shorter duration ILT | |
| Our company is fast growing and has had massive change in leadership across the board as we prepare to scale to greater heights. Keeping the EDU team top of mind in a bigger company is more challenging. | |
| Most companies like ours are also providing "informal" education eg Developer Days. Meetups and professional forums are covering reasonable intro to intermediate training. Offering more informal education delivered by customer/developer advocates. | |

[Back to top](#)