



Computer Education Management Association  
Europe

## CEdMA Worldwide Training Market Barometer 2<sup>nd</sup> 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 (six of which were North America only) and 24 for EMEA. **These increases result from a concerted effort in April/May 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.**

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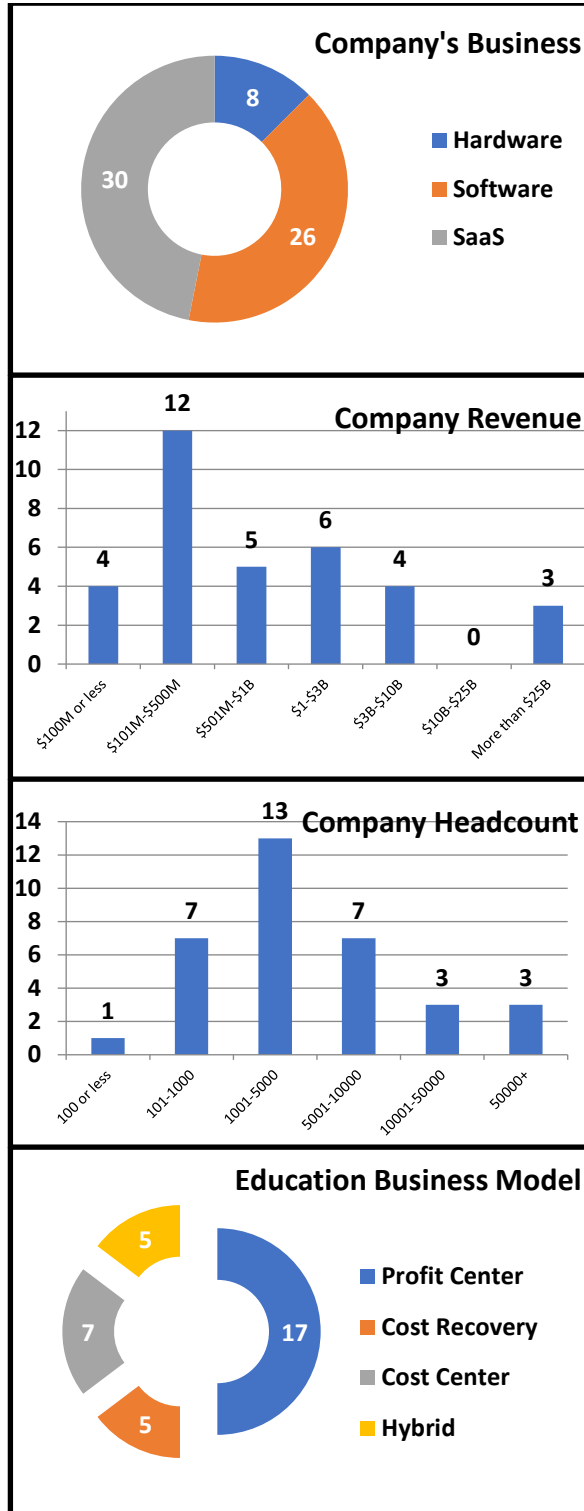
[Two greatest business challenges in last 3-6 months](#)

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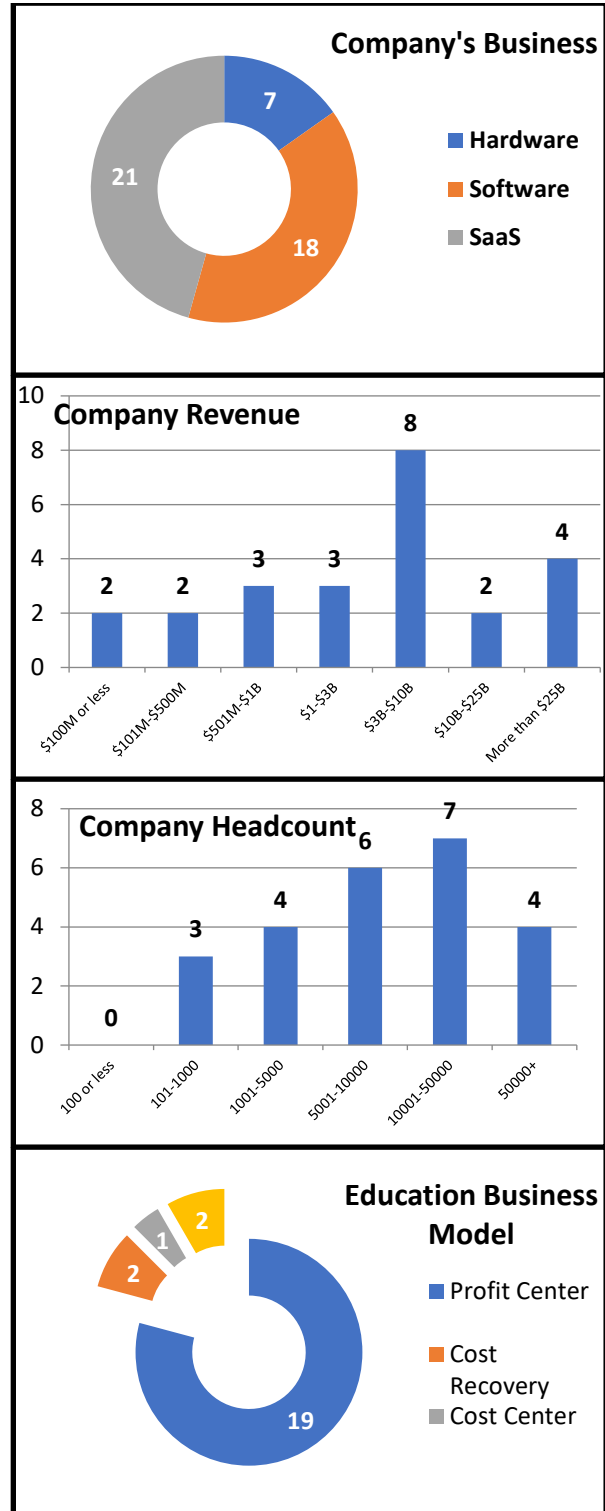
## Member Profiles

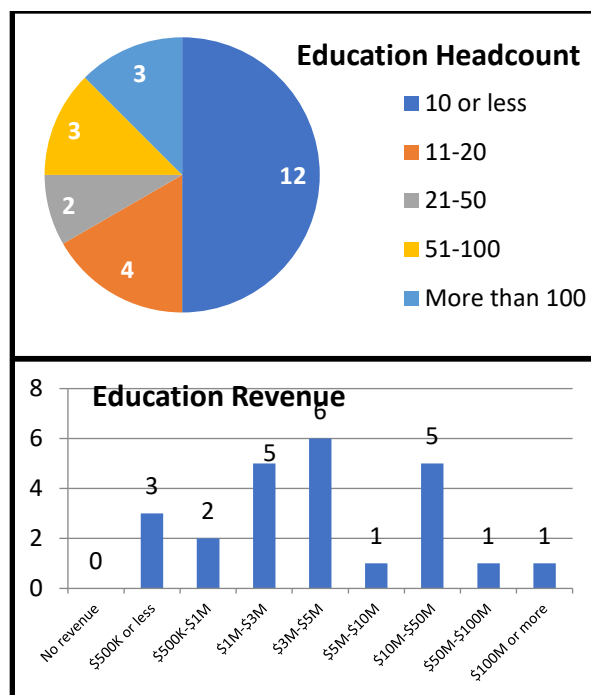
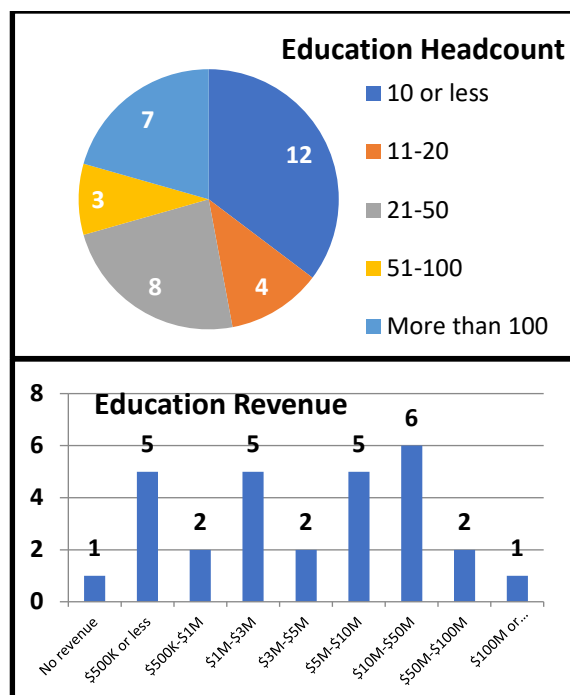
Sample size for 21q2 was 34 for Worldwide and 24 for EMEA.

### 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 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 positive 4% through 21q2.

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 positive 1% through 21q2.

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

WW: The growth trend is up to 3% at 21q2, 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 21q2.

**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, now negative 3% in 21q2.

EMEA: It fell to negative 2% during 2014, recovered to flat in 2015, showed a 2% decrease in 2017, was flat in 2017-18, fell to negative 5-6% to 20q1, then to -9% in 20q2.

**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 10% growth with very little live training.

EMEA: The trend dropped from 6% during 2013 to 1% in 2014-15 but has risen steadily to 11% through 21q2 with very little live training.

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

WW: The trend has dropped to negative 10% through 21q2, having peaked at 1-2% in 2014, and been flat in 2015-16, but negative since 2017, now negative 9% through 21q2.

EMEA: The trendline was negative 3% in 2019 but is now negative 8% through 21q2.

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

WW: It's now showing a trend of negative 3% in 2021, 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 2% through 21q2.

**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 7-8% increase through 21q2, 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 8% increase year on year in 21q2 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 remains at 11% through 21q2 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 7% through 21q2 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 12% through 21q2.

EMEA: The increase was 3% in 2018 but slipped to flat in 2019 but now is back up to 8%.

**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 21q2 is showing just below 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 negative 2% following a significant recent downturn. But with only five 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 6%.

EMEA: The trend has jumped from a steady 1% to positive 9%.

**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 10-11%.

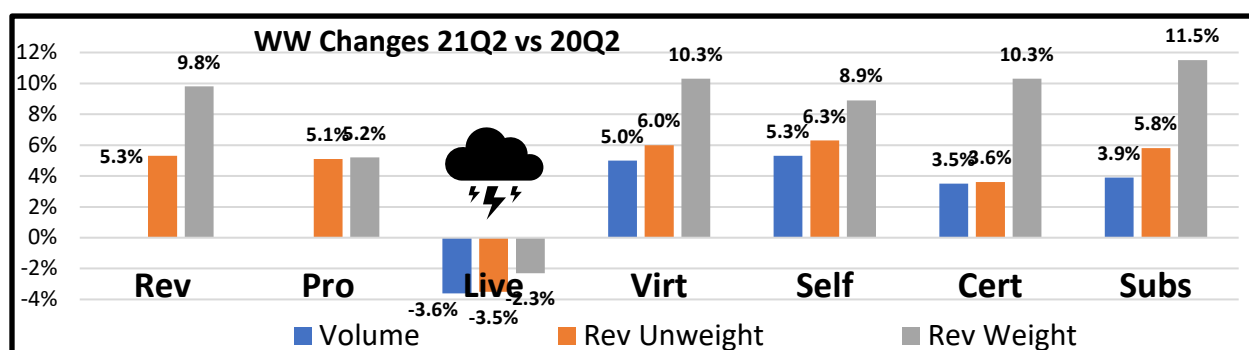
EMEA: With many companies starting in 2015/16, the increase was 8% over 2016, dipped to 3% in 2017, rose to 11% in 2019, fell back to 8% in 2020 but is now 10-11%.

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## Volumes as well as revenue

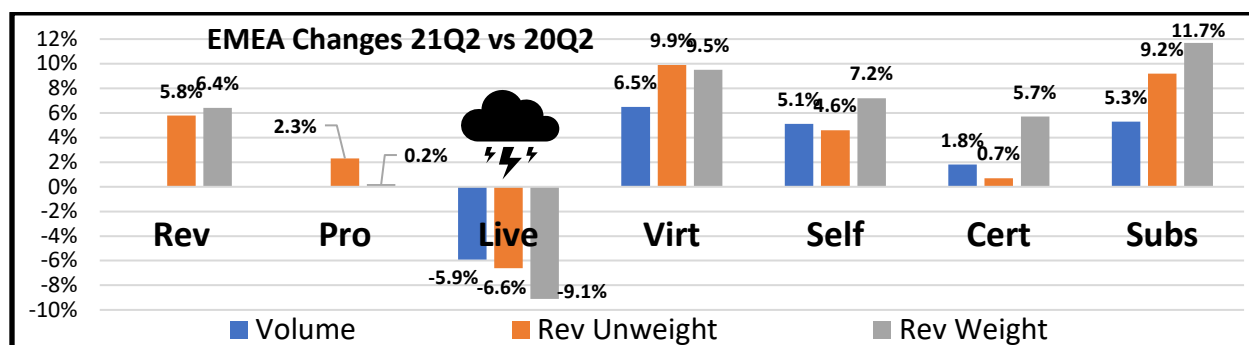
We now ask for percentage movement of modalities by volume of students in addition to or instead of revenue. Of course, volume averages will only be for unweighted input. Here's the comparison for 21q2.

WW	Rev	Prof	Live	Virtual	Self	Cert	Subs
Volume			-3.6%	5.0%	5.3%	3.5%	3.9%
Revenue Unweighted	5.3%	5.1%	-3.5%	6.0%	6.3%	3.6%	5.8%
Revenue Weighted	9.8%	5.2%	-2.3%	10.3%	8.9%	10.3%	11.5%



The significant revenue increases for 21q2 compared to 20q2 are revenue, virtual instructor-led, self-study, certification and subscriptions. Live instructor-led is coming back slowly.

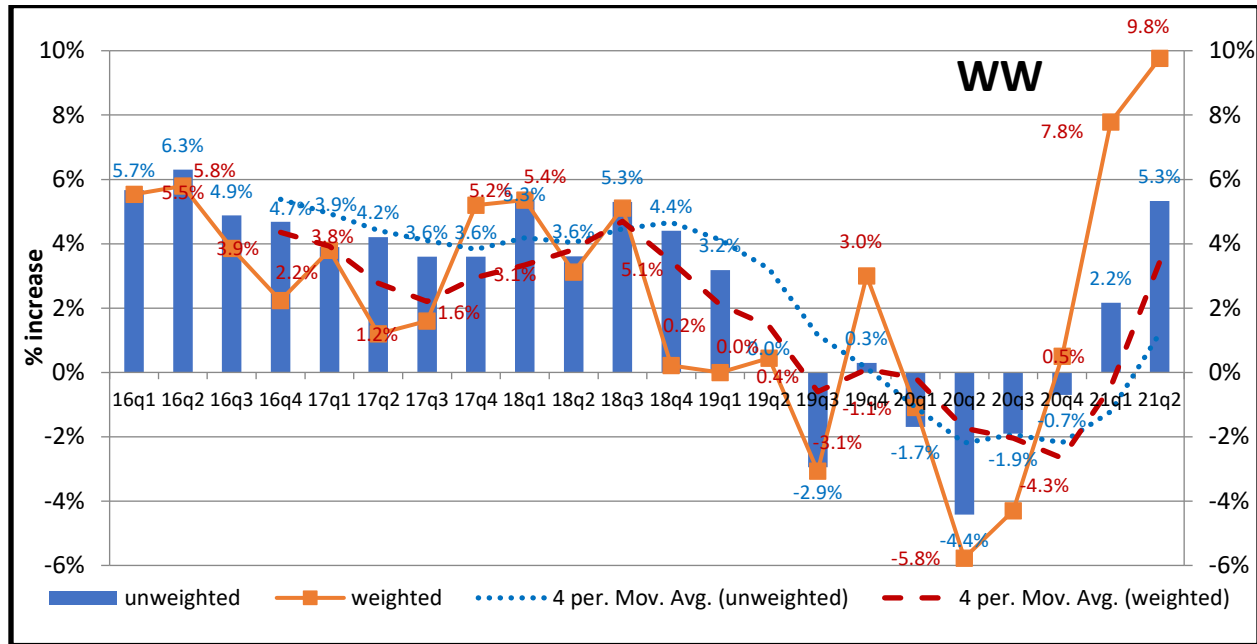
EMEA	Rev	Prof	Live	Virtual	Self	Cert	Subs
Volume			-5.9%	6.5%	5.1%	1.8%	5.3%
Revenue Unweighted	5.8%	2.3%	-6.6%	9.9%	4.6%	0.7%	9.2%
Revenue Weighted	6.4%	0.2%	-9.1%	9.5%	7.2%	5.7%	11.7%



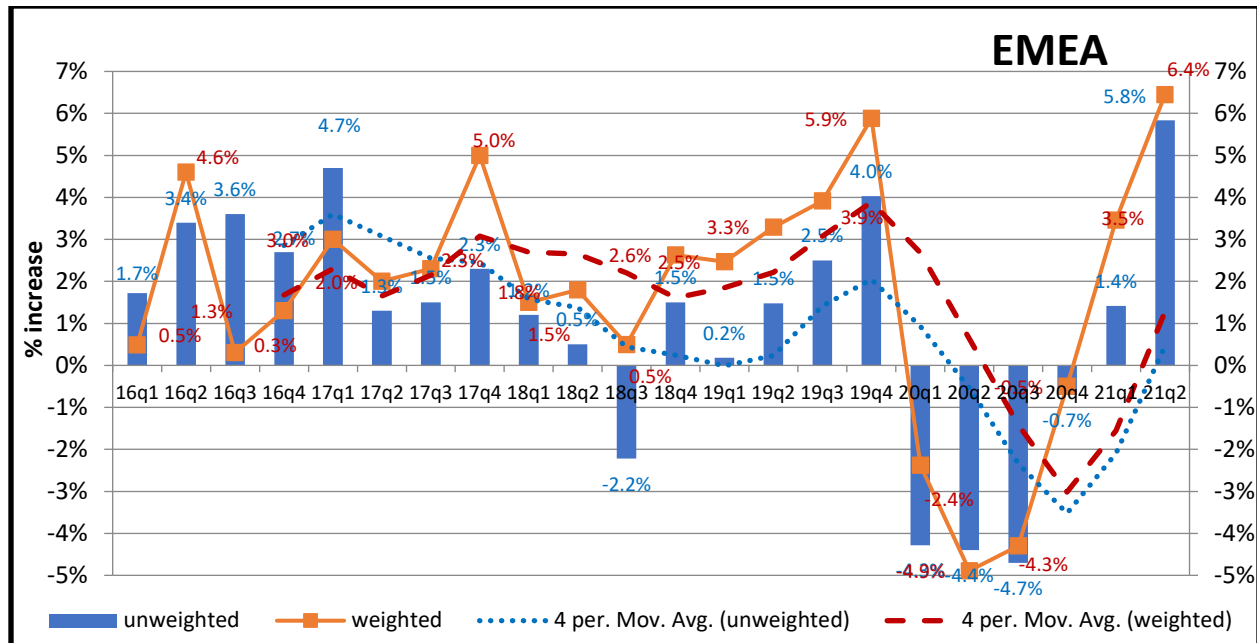
The significant revenue increases for 21q2 compared to 20q2 are revenue, virtual instructor-led, self-study and subscriptions. Live instructor-led is coming back slowly.

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## Overall Training Revenue



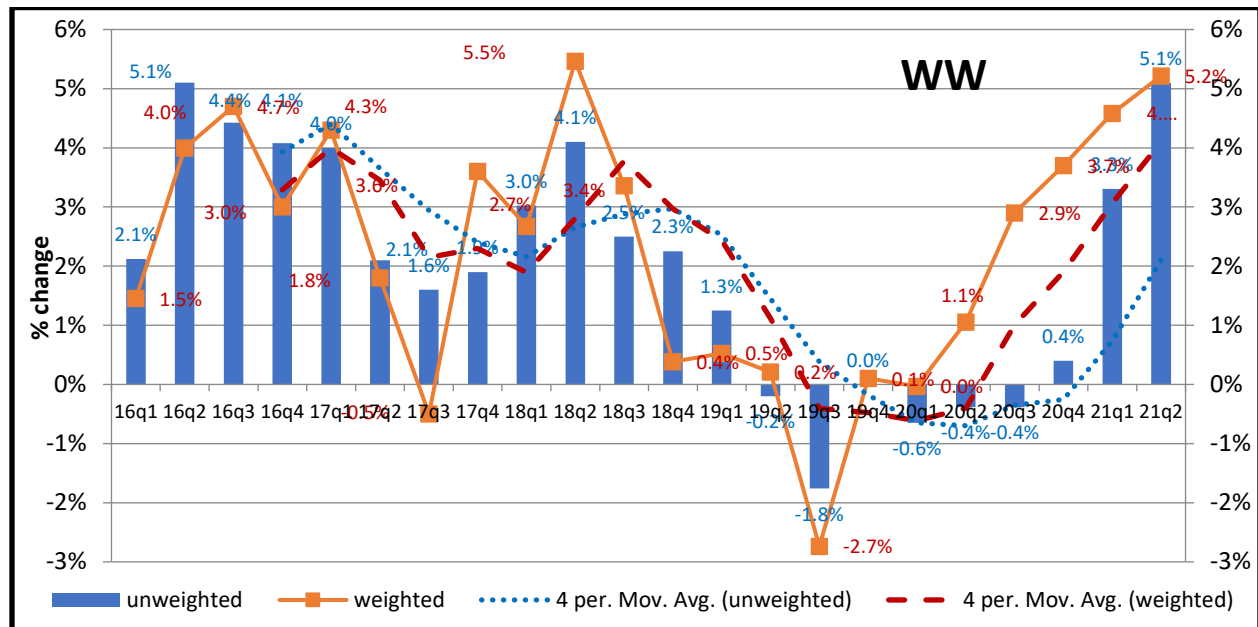
The unweighted total training **revenue** increase for 21q2 (u=20, f=4, d=6) was 5.3%. However, the weighted total training **revenue** increase was 9.8%. The 4-period moving average is currently showing positive 3% for weighted.



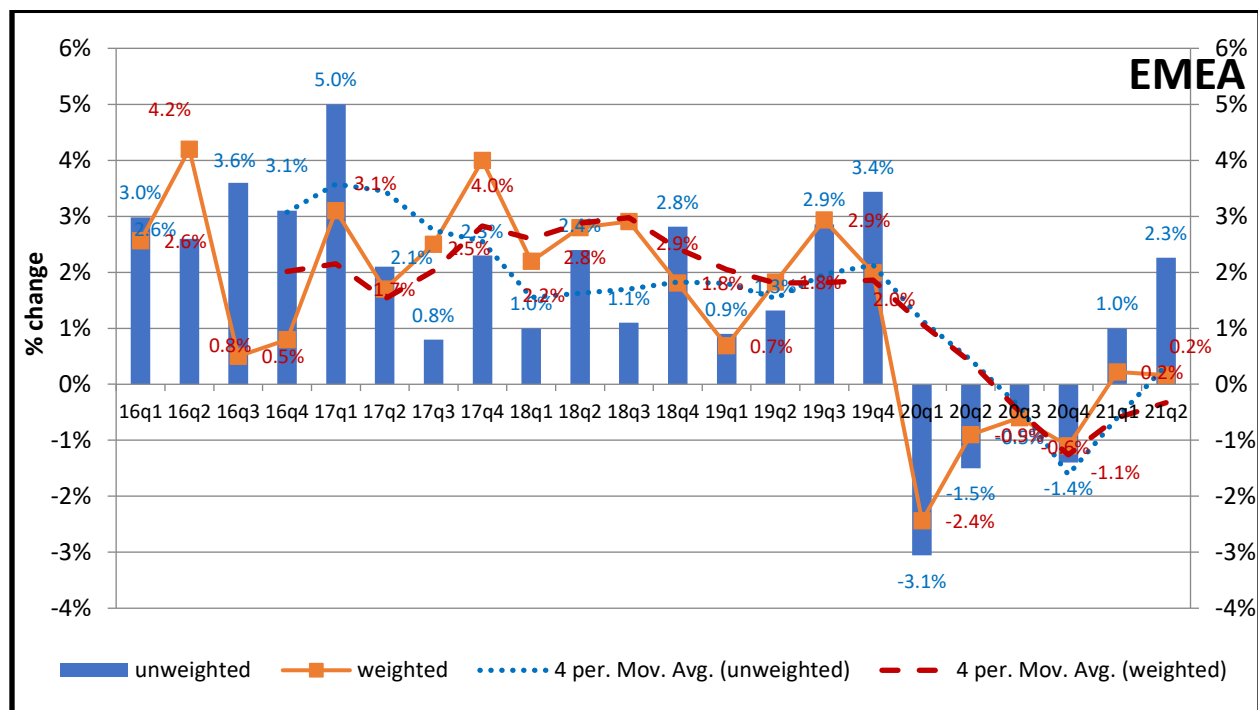
The unweighted total training **revenue** increase was 5.8% in 21q2 (u=17, f=4, d=3). When considering the weighted numbers, it was 6.4%. However, the weighted trendline has turned and shows a increase of 1% over the last four quarters when size of company is considered.

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## Training Profit



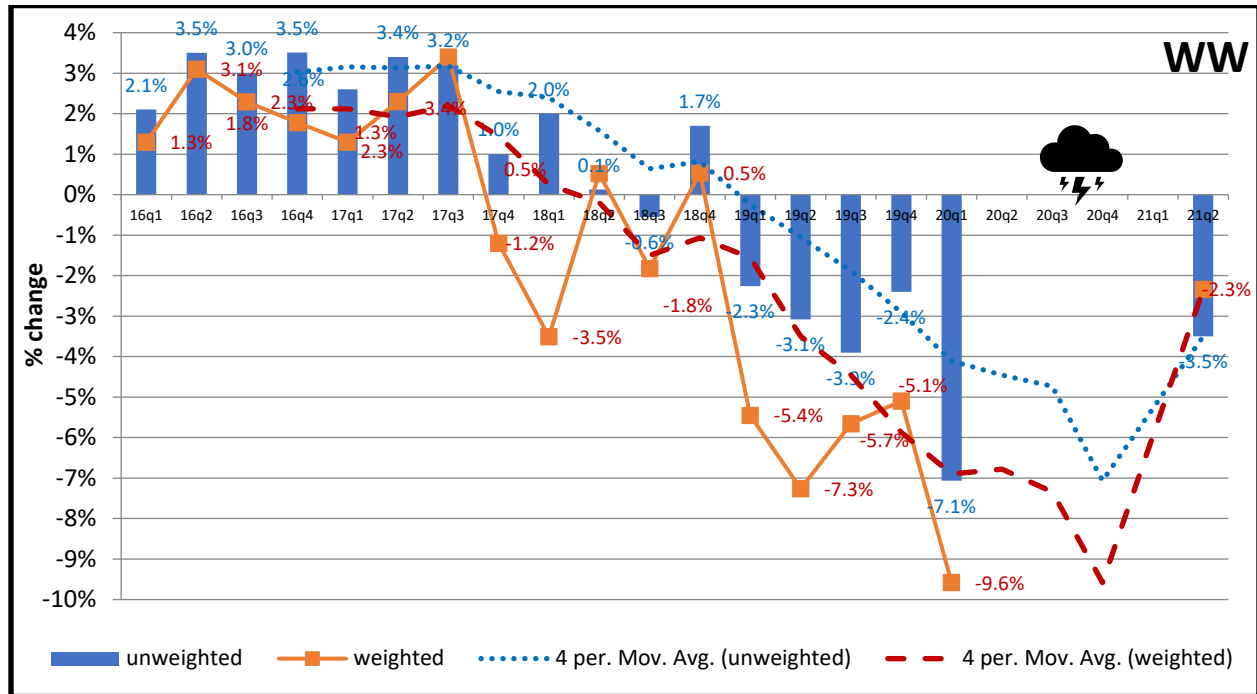
Training profit in 21q2 (u=20, f=5, d=1) increased 5.1% for unweighted and 5.2% for weighted. The training profit weighted trendline has recovered to positive 4%.



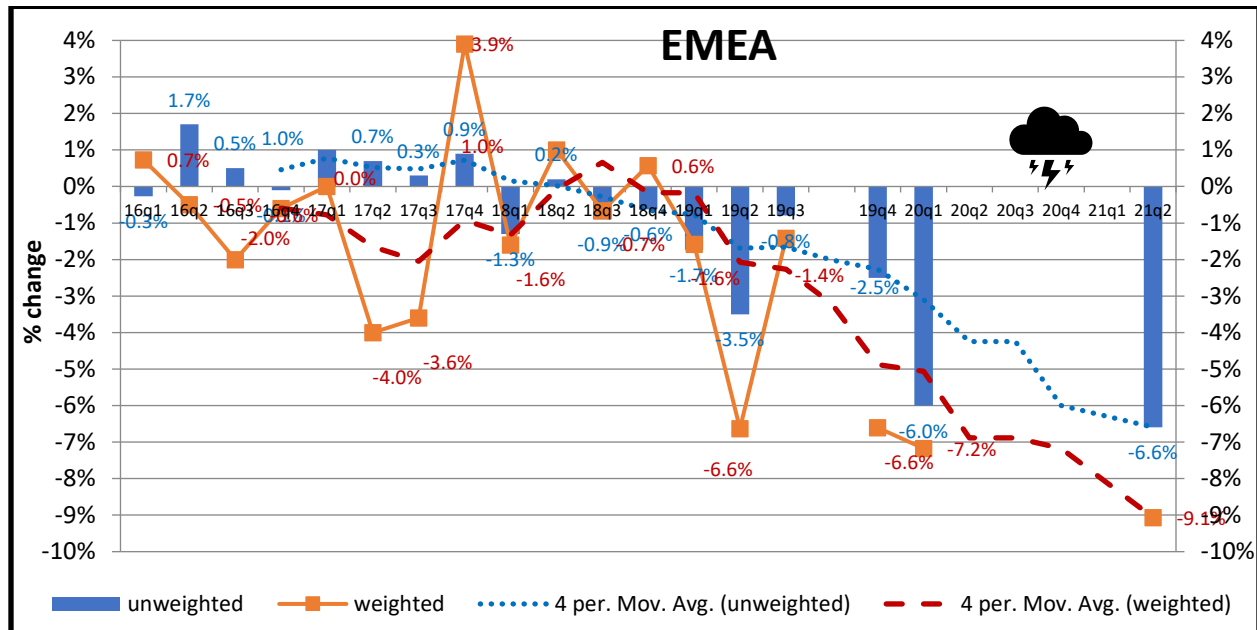
The unweighted total training profit rose 2.3% in 21q2 (u=11, f=6, d=4). And, with the weighted numbers, there was also an increase of 0.2%. The weighted trendline shows an ongoing profit decrease of just under flat for the last four quarters when size of company is considered.

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## Live Instructor-led Training



Live instructor-led training is back for 15 members ( $u=3$ ,  $f=4$ ,  $d=8$ ) which leaves the unweighted change of negative -3.5% and a lower negative -2.3% when weighted. The weighted moving average is -3%.

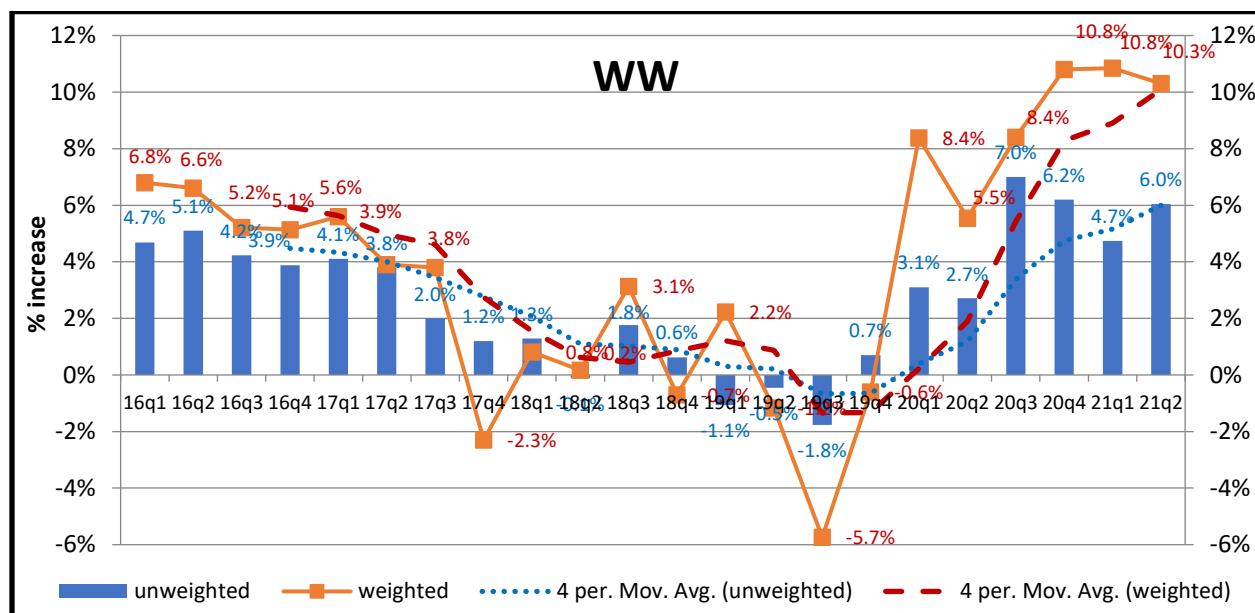


Live instructor-led training is back for 11 members ( $u=2$ ,  $f=2$ ,  $d=7$ ) which leaves the unweighted change of negative 6.6% and a higher negative 9.1% when weighted. The weighted moving average is -9%.

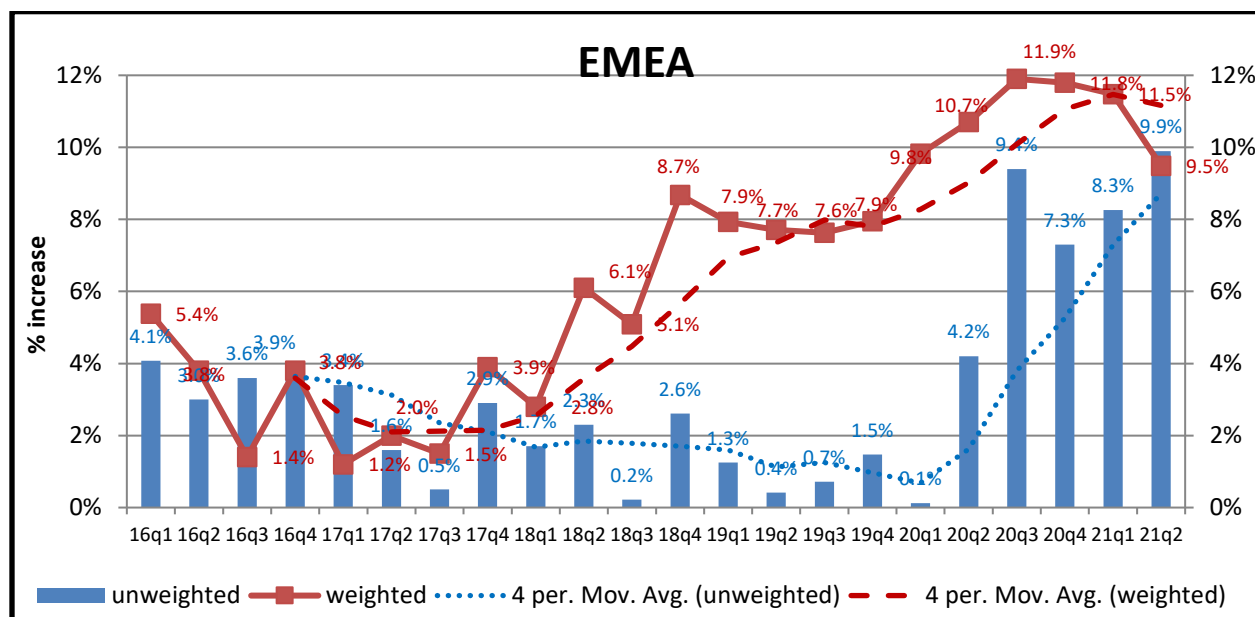
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## Virtual Instructor-led Training



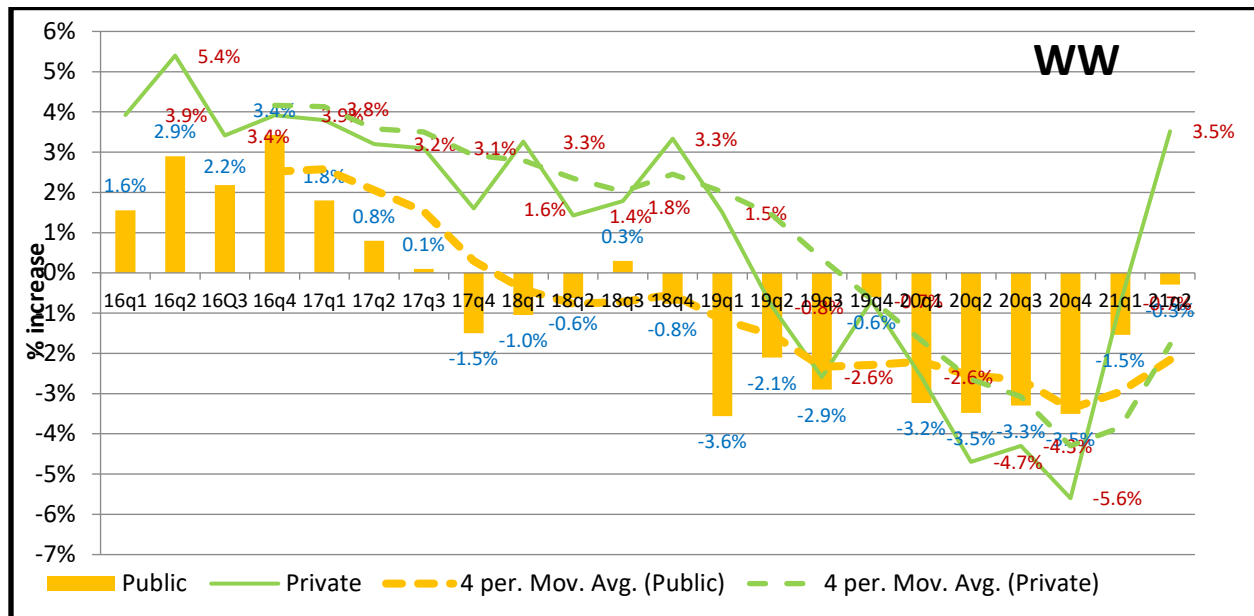
Virtual classroom has continued its upturn. The unweighted virtual classroom **revenue** increase for 21q2 (u=20, f=5, d=4) was 6.0%, with the weighted **revenue** increase at 10.3%. The increase in **volume** was 5.0%. The 4-period moving average for weighted is 10%, up from 3% in 2017 and -1% in 2019. COVID-19 sparked this recovery.



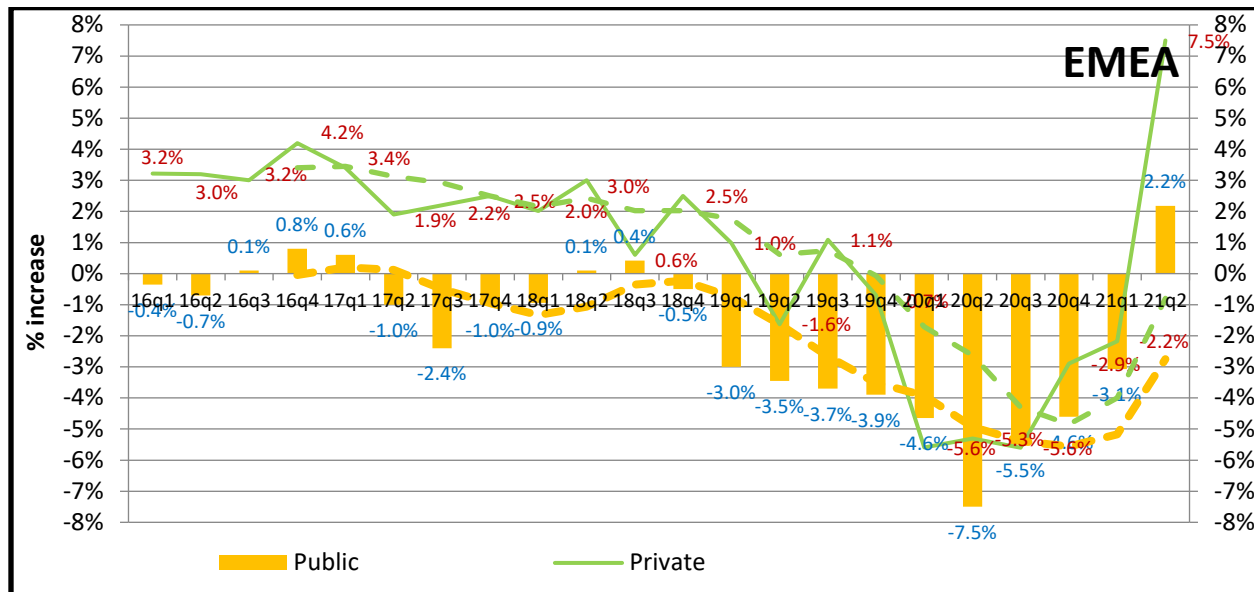
To compensate, the VILT increase continues. The unweighted 21q2 **revenue** increase is 9.9% (u=22, f=1, d=1) and the weighted increase 9.5%. The increase in **volume** was 6.5%. The weighted trendline shows an ongoing VILT increase of 11% when size of VILT revenue is considered, but it was 3-4% in 2016 and 8% in 2019, having been 1% in 2014.

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## Public v Private Unweighted



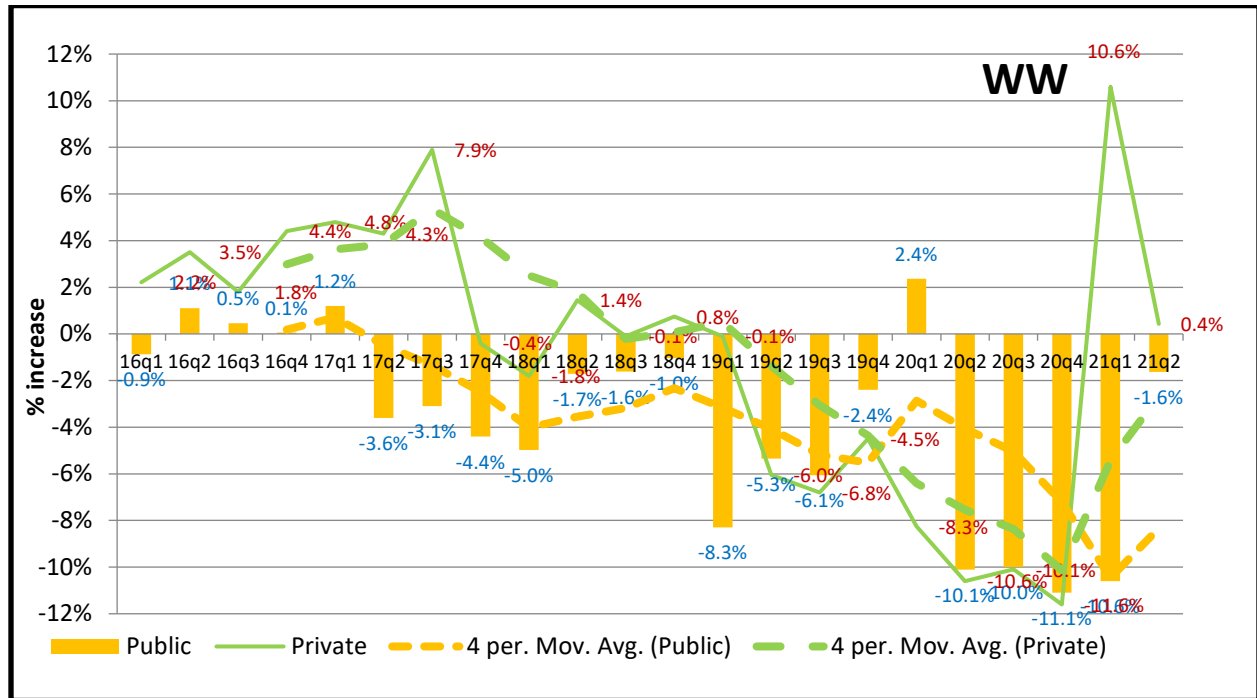
We include questions on public classes and private classes. Unweighted public **revenues** have decreased in 21q2 by -0.3% and private increased by 3.5%. The increase in **volume** was 1.5% for public and 0.6% for private. The trendline is now negative 2% for public and private. (Note that public is u=11, f=7, d=8 and private u=14, f=9, d=4.)



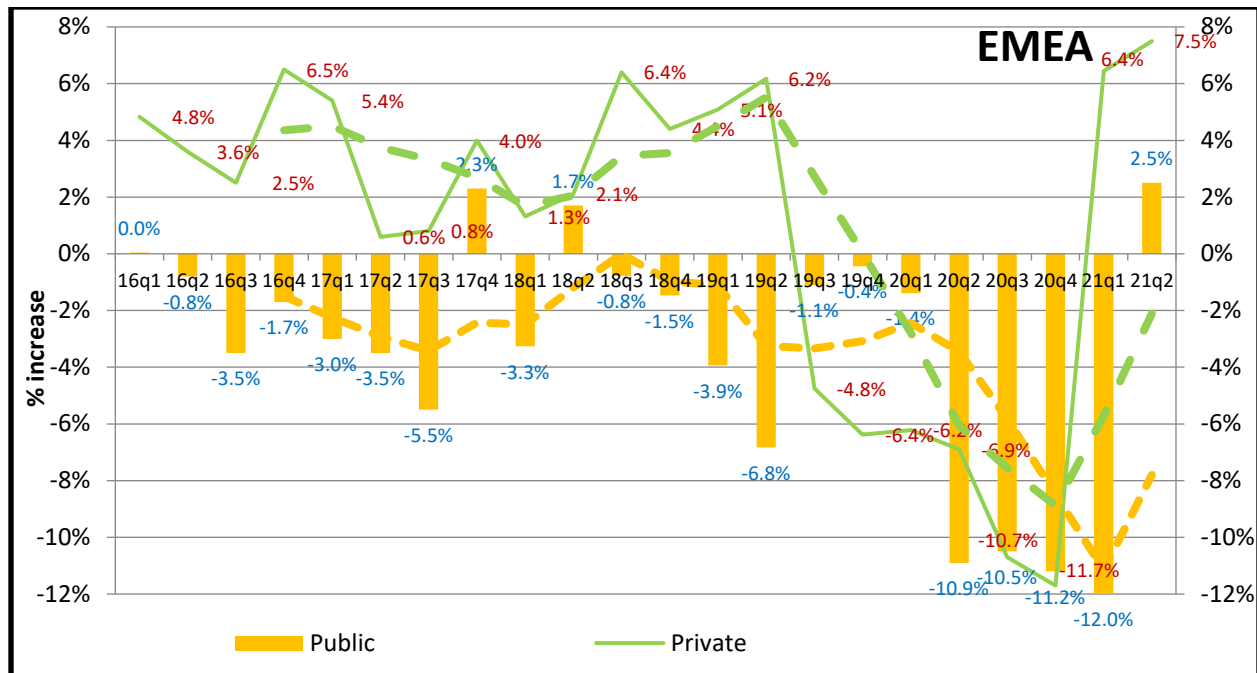
We are now asking you to forecast both public (u=13, f=1, d=9) and private (u=13, f=4, d=7) classes and have enough history to show that private classes show **revenue** is falling 1% over the last four quarters, and public classes are also decreasing 2%. **Volumes** increased 2.1% for public and 4.0% for private. This shows unweighted values.

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## Public v Private Weighted



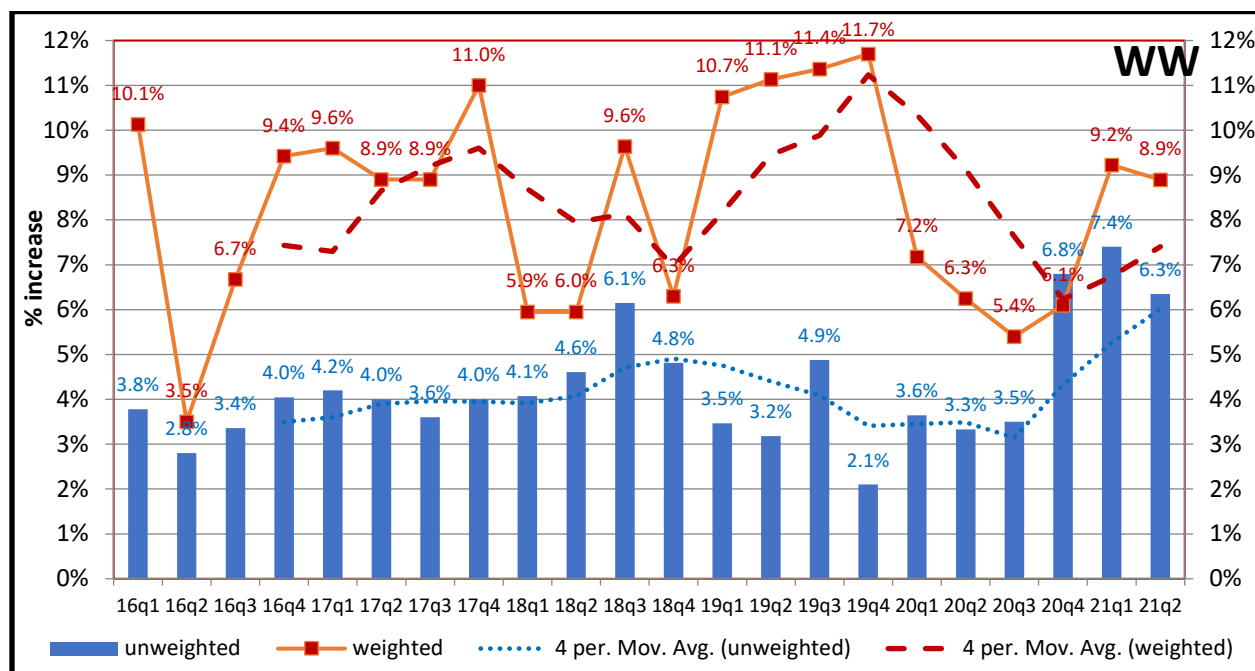
When weighting is considered, the changes from 21q1 are also dramatic. In 21q2, public **revenue** has decreased by -1.6% and private **revenue** decreased -0.4%. The 4-period moving average is negative 8% for public and negative 3% for private.



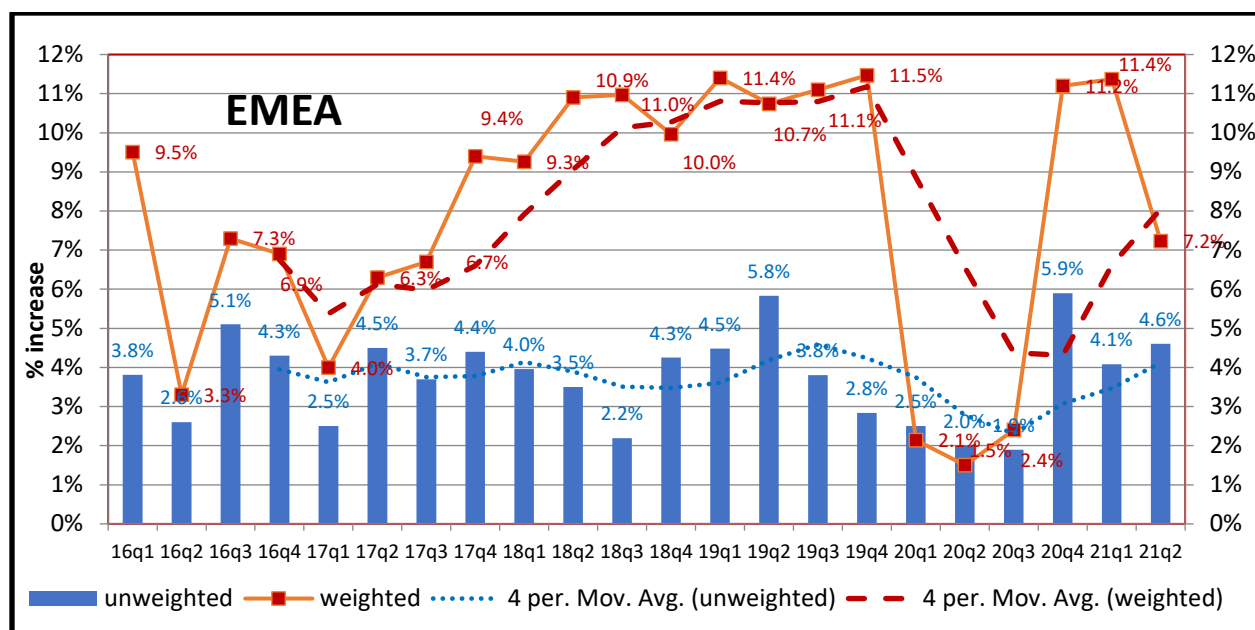
Weighted values have the **revenue** trendline for public showing negative -8%, private negative -2%.

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## Self-Paced



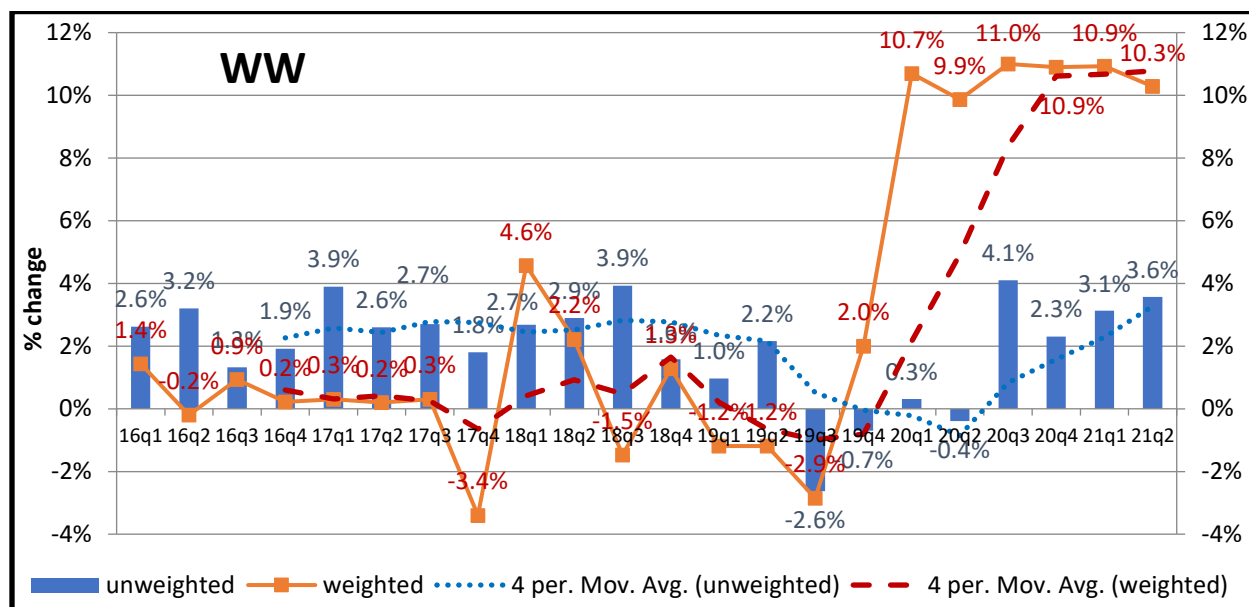
The unweighted self-paced **revenue** increase in 21q2 (u=21, f=2, d=3) was 6;3%. However, the weighted self-paced **revenue** increase was 8.9%. The increase in **volume** was 5.3%. The 4-period moving average shows 7-8% for weighted.



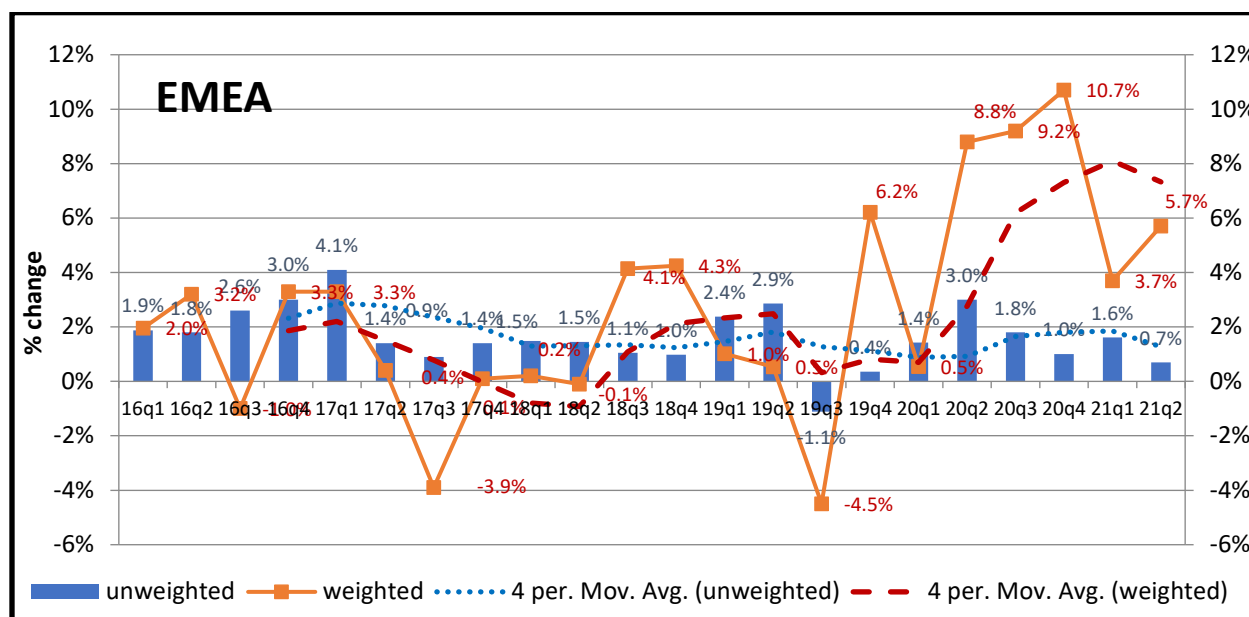
The results for 21q2 (u=16, f=0, d=3) were 4.6% increase unweighted and 7.2% increase weighted. The increase in **volume** was also 5.1%. Larger companies still have a significant effect on these averages. The 4-period moving average is 8% increase for weighted, with companies back to charging.

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# Certification



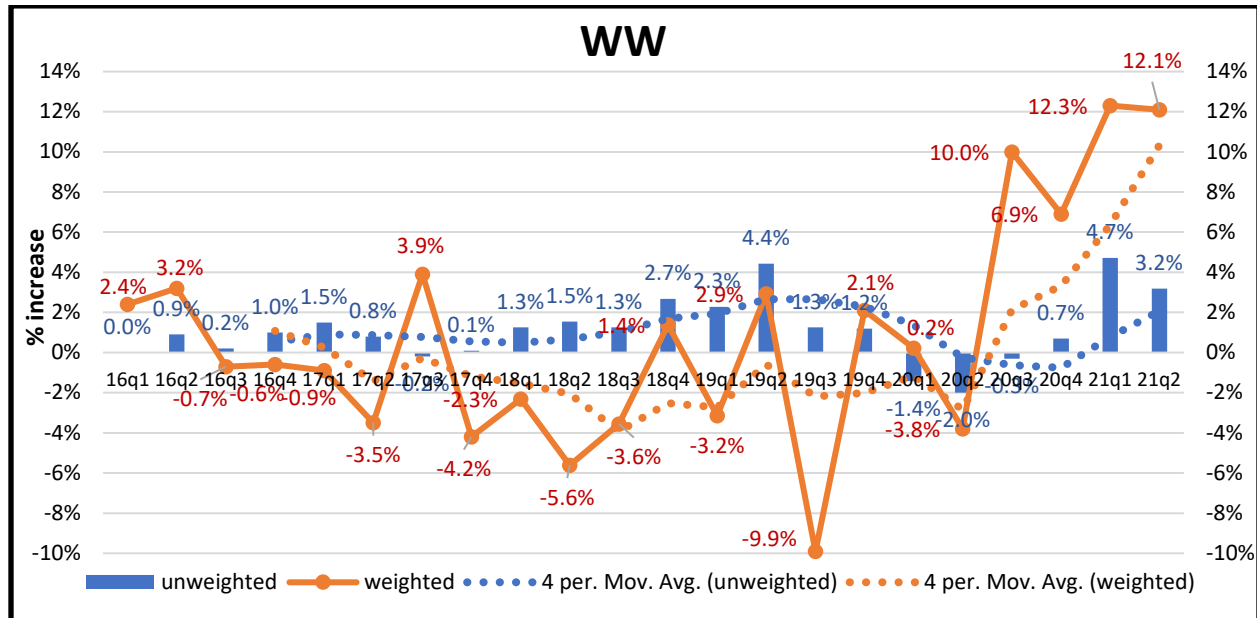
The unweighted certification **revenue** increase for 21q2 (u=14, f=8, d=6) was 3.6%, and the weighted certification **revenue** increase was 10.3%. **Volume** was an increase of 3.5%. The weighted 4-period moving average is 11%. Customers and partners may be taking advantage of the pandemic for re-skilling and certification testing.



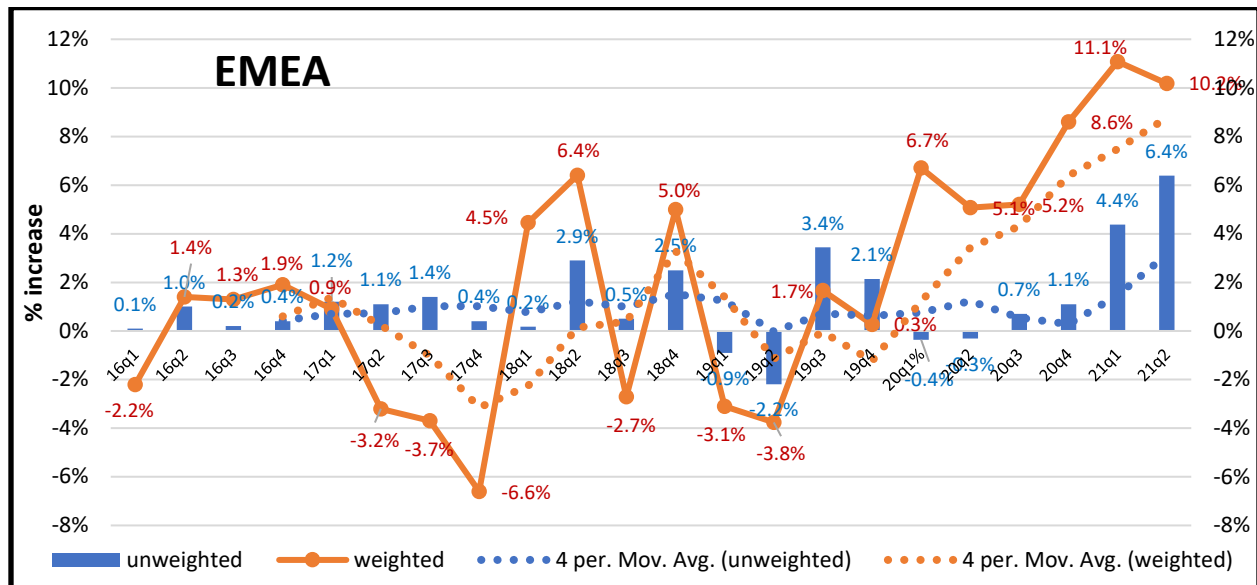
Certification has shown several swings over the last four years. However, the latest large increase has probably resulted from the push by partners and customers to certify more staff. The increase in **volume** was 1.8%. The **revenue** increases for 21q2 (u=7, f=7, d=4) are 0.7% for unweighted and 5.7% when weighted. The weighted 4-period moving average is 7%.

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## Learning Consulting



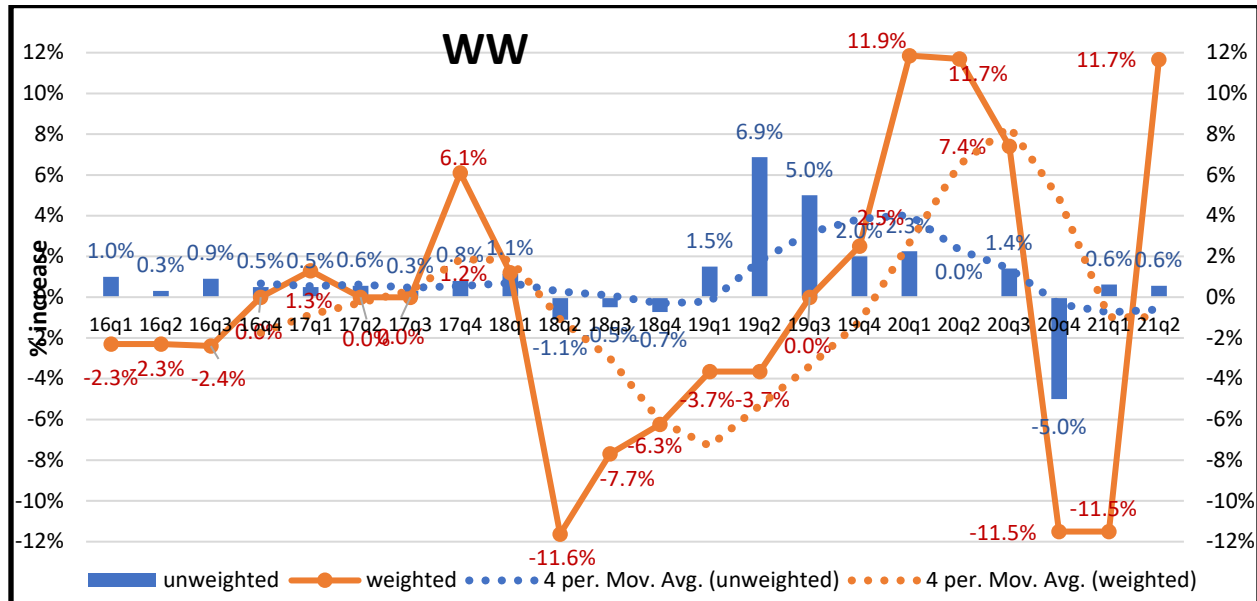
We now have over five years reporting this area. Weighted scores have been volatile and show a moving average of positive 10%. The increase in **volume** was 1.2%. The **revenue** changes for 21q2 (u=5, f=5, d=1) are 3.2% for unweighted and 12.1% when weighted.



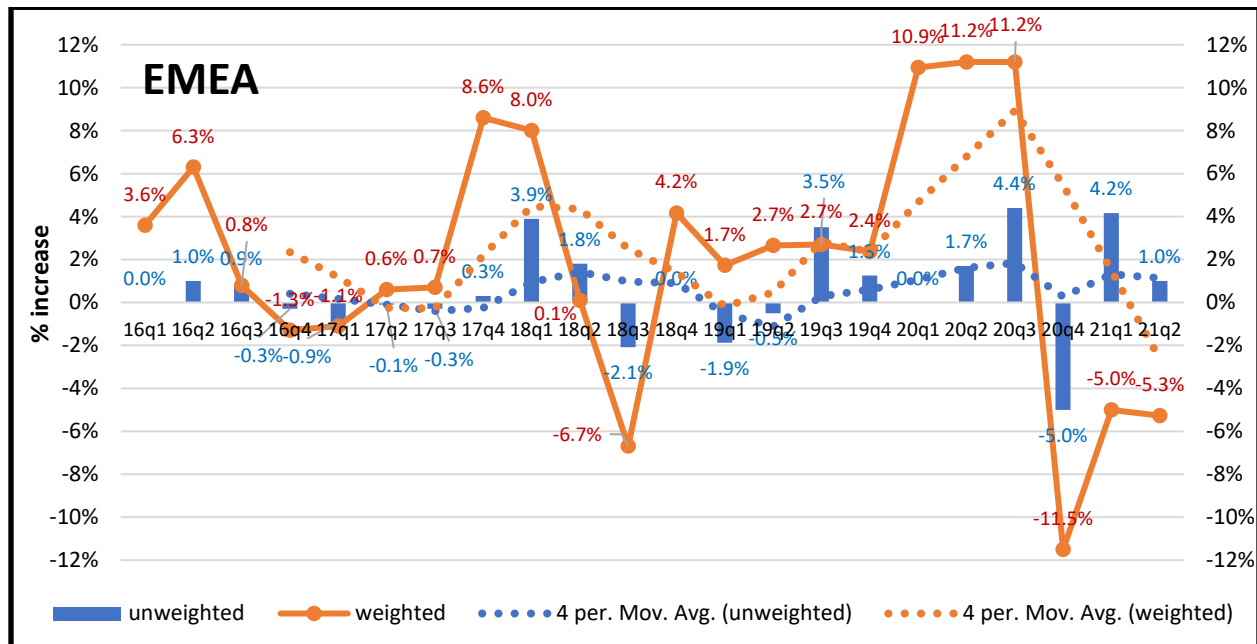
We now have five years reporting this area. In that period, the unweighted scores have largely remained flat. However, weighted scores have moved dramatically. The **revenue** increase for 21q2 (u=5, f=4, d=0) is 6.4% for unweighted but 10.2% when weighted. **Volume** increased 2.0%. The current four-period average for weighted is 8-9% increase.

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## Learning Technologies



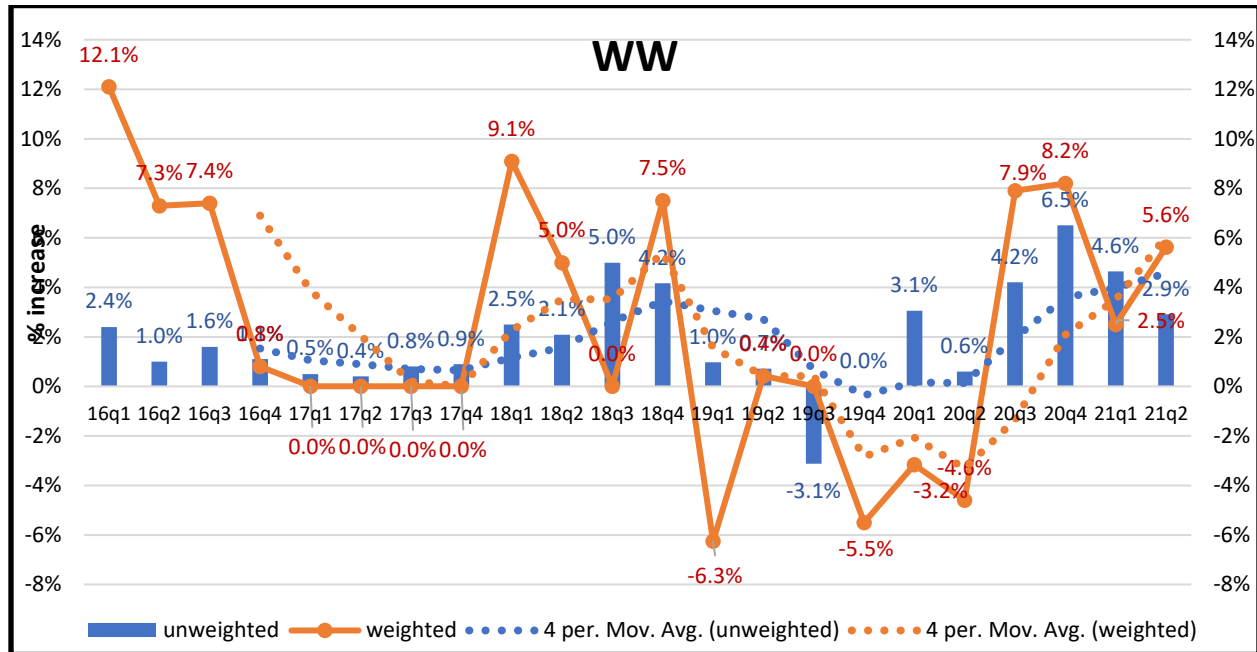
We also now have over five years reporting this area. The trendline for weighted scores has dropped to just below flat, maybe caused by no onsite work allowed. The **revenue** increase for 21q2 (u=3, f=5, d=1) was 0.6% for unweighted and 11.7% when weighted.



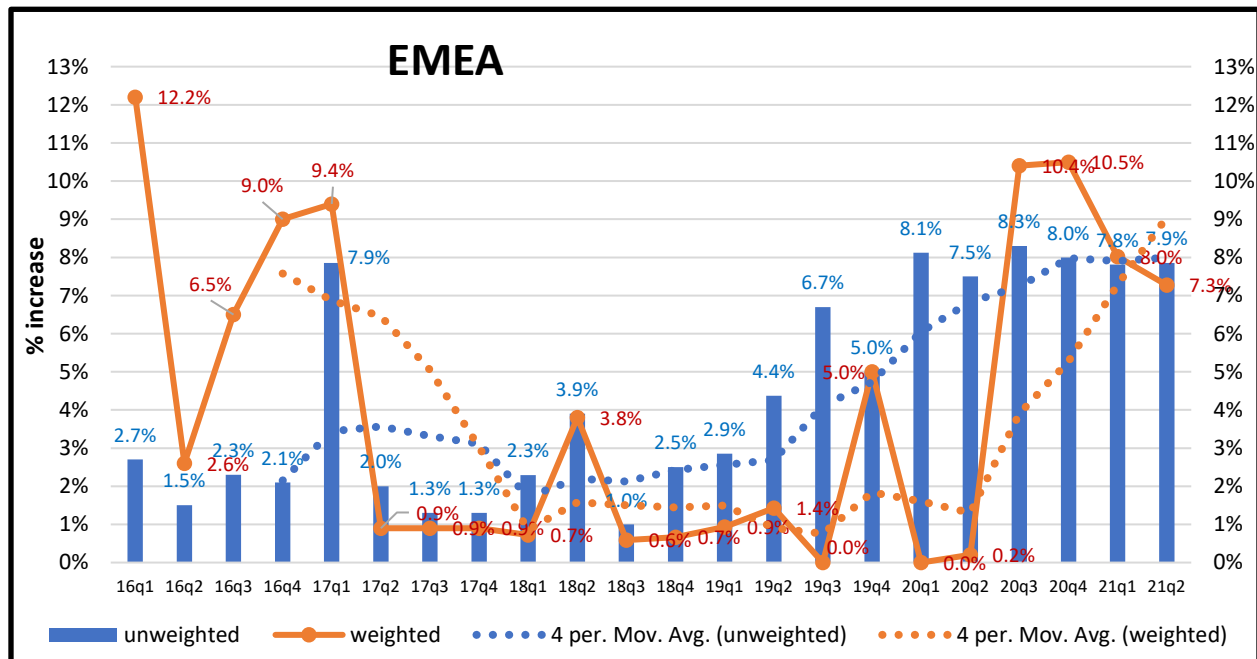
We also now nearly five years reporting this area. In that period, the unweighted scores have recently shown a little volatility. The **revenue** increase was 1.0% for 21q2 (u=2, f=1, d=2) for unweighted and a -5.3% decrease when weighted. The trendline for weighted is down to negative 2%.

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## New Learning Modalities



We now have 22 quarterly reports. In the last 12 months, the trendline for unweighted scores is showing positive 4% and for weighted scores positive 6%. The increase in **volume** was 1.7%. The **revenue** for 21q2 (u=6, f=6, d=0) is 2.9% for unweighted and 5.6% for weighted.

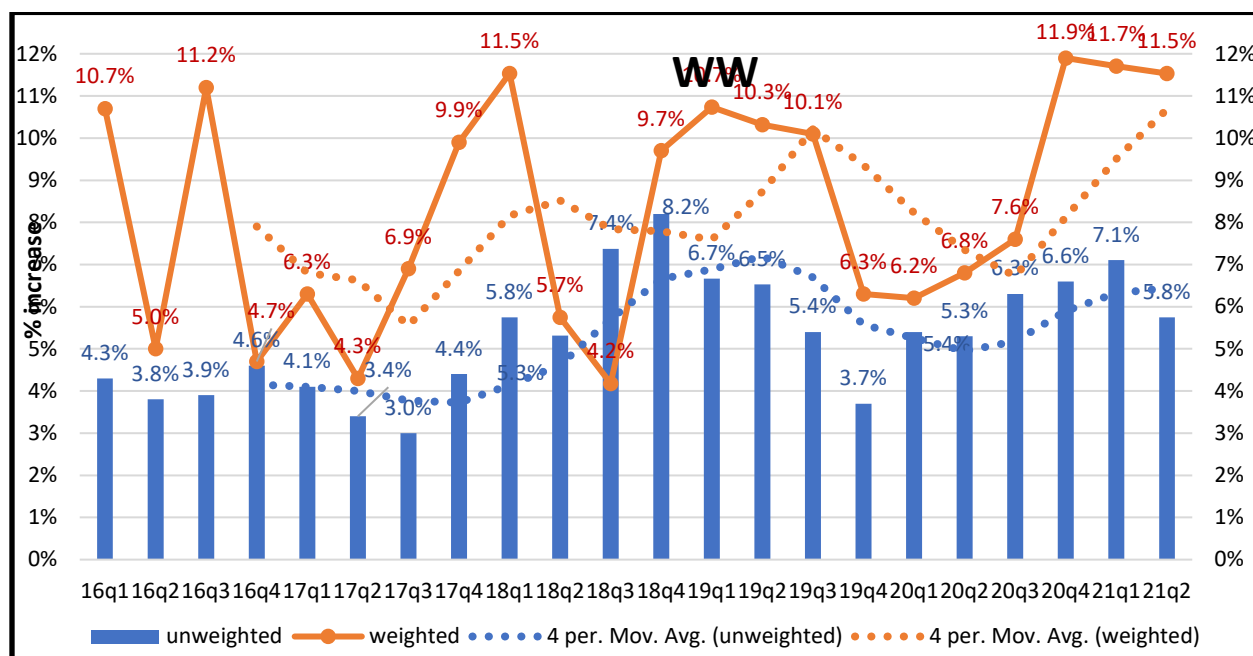


The unweighted trendline is 8%, while the weighted trendline shows 9%. The **revenue** increase for 21q2 (u=6, f=1, d=0) is 7.9% for unweighted and 7.3% for weighted. The increase in **volume** was 3.8%.

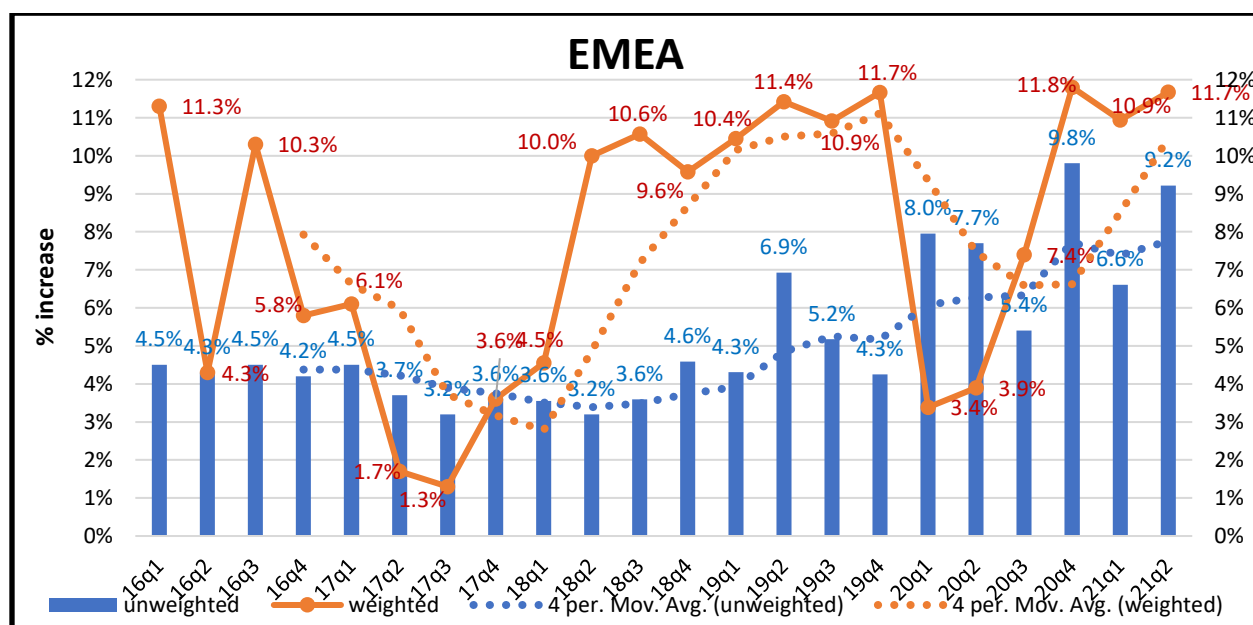
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## Subscriptions



We also have 22 quarterly reports here. Currently, the unweighted trendlines show a 6-7% increase and weighted 10-11%. The **revenue** increases for 21q2 (u=14, f=4, d=2) are 5.8% for unweighted and 11.5% for weighted. The increase in **volume** was 3.9%.



The unweighted trendline is 8%, with the weighted trendline 10-11%. The **revenue** increases for 21q2 (u=14, f=1, d=1) are 9.2% for unweighted and 11.7% when weighted. The increase in **volume** was 5.3%.

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

### Worldwide

1. Cloud
2. Large growth in new VILT classes (converted from ILT). Growth in our new e-learning subscription offering (self-paced). EDU is recovery from impact of Covid, our Teacher training sessions have recovered well.
3. Core product training
4. VILT
5. Subscription becomes the go to market and has considerable growth. Virtual training at core, aligned with the current context and future customer expectations.
6. Self-paced learning, online learning and hands-on labs.
7. VILT
8. Subscriptions.
9. Free partner training
10. We launched a new education program around Security and building Insider Threat programs that is available on a third-party site as well as our YouTube and openly available on our learning portal. We saw significant views on this content as it was on multiple platforms and freely available. 2020 - Code42 has been shifting our business focus from back-up and recovery tool to a Cyber Security company aggressively for the last year. Our education content for security features and tools as a result has seen an overall increase. Our subscription program launched in 2017 and we see that growing. 96% of our education sales are subscriptions. Our subscription program includes our entire portfolio, e-learning, ILT, VILT, customer conference and pre-conference education. 2019 - We made 75% of our on-demand content freely available to the public but our biggest impact with making it available was not watching end to end courses it is the views we receiving in videos we've embedded to our support articles.
11. Technical content (APIs)
12. IP Audio Essentials; ACS (VMS); Multisensors; Camera Interface; Perimeter protection; Inner area protection; Body Worn; IP Intercoms
13. Subscriptions
14. We had new product features released for which we needed to create new training programs for. This was where we found our biggest increases.
15. Training classes sold bundled with Support Contract grew significantly y/y. We continue to see strong VILT enrolments and volume growth, as we have moved almost exclusively to this delivery modality in response to Covid-19. Our eLearning/On Demand training is now accommodating more users than ever before, growing 30%+ y/y, but remains a small albeit growing part of our overall business. Our face-to-face training program is opening back up in certain countries, but remains much smaller than it was in the pre-pandemic world. Our Data & Analytics training, as well as our Security and ITSM offerings, are all generating triple digit y/y growth. We continue to achieve strong financial results, continuing top and bottom line growth. This ongoing recovery started roughly 9 months ago.
16. Self-Paced
17. We saw the biggest increase in certifications since we launched the program in April (3 exams)

18. Virtual classrooms (we moved to entirely virtual delivery starting in March, 2020 and have continued that). Certification program is growing, so year-over-year percentage growth there was significant.
19. Cloud-based products continue to overtake our portfolio
20. Virtual Instructor-led Training classes
21. Subscription content usage
22. We only provide product training, so we don't have subject areas.
23. Data Streaming Topics, Administrator Training (based on a new platform)
24. Not delivering training yet.
25. Training consulting hours and customized training
26. 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.)
27. Virtual
28. Subscriptions continue to grow, but growth slows down

## EMEA

1. Data Quality
2. Virtual Instructor Led - converted ILT classes to virtual - good recovery from Q2/2020 Covid impact. Subscriptions - with new offerings in Q3/2020 this continues to grow
3. Our training is always based on Adobe Digital Experience Software, but recently we have been releasing new software products that our Partners in particular are interested in getting trained on. So, training Partners on these new products has been a big driver of growth for us over the past 3-6 months.
4. Analytics, virtual classes and hands on labs
5. Interestingly more of a spread across different topics than in the last 3 - 6 months
6. Self-paced, VILT, Certifications
7. Private event live virtual classes
8. Consulting - change management consulting services is the growth area and opportunity for increased revenues
9. VILT
10. We saw strong y/y growth in both Product and Support Contract "attach" sales; we earned strong y/y growth as well in indirect ("channel") sales. Our Security, ITSM, and Networking courses experienced the highest y/y growth for our EMEA countries
11. Self-Paced.
12. None. Only addition was subscription which is increasing. Same again for this quarter
13. Self-Paced Learning Labs
14. Skill badges, self paced labs and on-demand
15. Admin & Marketing Cloud
16. Learning Portal creation; Learning Subscriptions; Free e-Learning
17. Digital Learning & Credentialing
18. Industrial applications
19. Both Public scheduled courses and private courses increased substantially
20. Virtual classes
21. Server; Hyper Converged.
22. Subscriptions (but growth slowed down) public and private improved

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

### Worldwide

1. Data Engineering
2. Public ILT live/in-person classes not offered anymore - leave to partners. Private ILT still offered but take up low due to travel restrictions.
3. Public schedule classes in a classroom
4. Live training and private sessions
5. Live classroom (in-person)
6. Instructor Led Face to Face
7. none, growth is 25-30% in all segments at present.
8. Paid for customer training
9. 2020 Q3 - we saw dip in our on-demand enrollments, we think this due to a change we made on our website not highlighting how to access the on-demand equipment. 2020 - over the last year Code42 has stopped selling and renewing our on-premise server option as a result our classes for configuring and maintaining have decreased. Instructor-led classes one off seats in a class and onsite training at customer location. In 2019 we continue to struggle filling regional locations of instructor-led deliveries. We'll probably have 3 total this year. Our customer base says they cannot take the time to commit to a 3-day class.
10. Mainframe and older technologies
11. Network Video Fundamentals and certification; VMS Audio
12. Instructor Led
13. Our public (open) face to face training enrollments remain much lower than in Q1 2020. Our Microsoft training offerings, and certain older proprietary technology courses, declined most significantly y/y.
14. Public Classroom
15. Decrease in ILT deliveries in the last 3-6 months (executed) but increase in sales of them (future deliveries)
16. Reductions in private training engagements that were delivered on-site.
17. Firewall
18. Live Classroom-based training
19. Certification exams
20. We only provide product training so we don't have subject areas.
21. Foundational developer training
22. Not delivering training yet.
23. ILT Moving traditional services revenue over to SaaS model
24. No return to in person yet.....
25. Private Onsite Training went to zero with COVID; Public Classroom Training went to zero with COVID

## EMEA

1. ILT Live/in-person public classes - we don't plan to run any more public in-person/live ILT classes, removed from price books. The only in-person/live ILT classes we run now are private.
2. Some legacy products are starting to see less demand.
3. Video based training
4. Face to face onsite/public
5. Our model has changed to be learning included in PEPM costs so the revenue data being provided is no longer an accurate qtr on qtr reflection of trends for our organisation.
6. Public ILT
7. Linux and Microsoft enrollments continue to decline in our EMEA countries; almost every other training portfolio actually grew y/y in our most recent quarter.
8. Certification, Public.
9. Private classes and some virtual
10. Public Classes
11. Dedicated onsite training incl certification journey programmes
12. Financial
13. Onsite (single organisation) classes
14. Games applications
15. Live classes
16. High End storage
17. no classroom training

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

### Worldwide

1. Limited training budgets and ensuring customer satisfaction in virtual courses when they would have preferred in-person.
2. Still in the process of converting remaining ILT classes to VILT, which has delayed other eLearning development projects. Encouraging product sales to attach new learning subscriptions to deals.
3. Uncertainty as to when to return to in-person ILT
4. Postponement of classes due to COVID. Hybrid Classes are now picking up
5. Lack of travel for instructors; Customers wanting in person vs. VILT
6. Achieving plan in the context of COVID-19 Converting International business to subscription offering; Private deliveries in Asia
7. Prove the value of training to overall company revenue and education services results.
8. lack demand on training
9. Impact of Covid
10. Cornerstone LMS is not only dysfunctional when it comes to running a training business, the vendor's support is among the worse every experienced. Training sales outside of the U.S.
11. Moving to freemium model is putting pressure on revenue. Push to move to subscription model

12. Same two as last time but our renewal rate is up. Q3 2020 Customer Success team's awareness of our training opportunities and having them help drive attendance and consumption. Getting customers to actually consume the training they purchased, both on-demand and instructor led. Renewing the education subscription the second year, we have been running roughly a 50% renewal.
13. Transforming from a traditional business to a more modern, learner centric business. Business change but comp plans and motivational drivers did not. This has sent mixed messages internally.
14. In person Training; Travel
15. 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.
16. Reduced capacity as team members have shifted roles. We've had to work hard at sorting out highest priority items for creating training. Rapidly changing initiatives across the organization.
17. 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.
18. No Services Sales team. Reliant on Licence Sales team.
19. Our new LMS is unacceptable and terrible integration issues. We moved from Litmos to Docebo and we have had serious issues. Revenue recognition (backlog of training sold versus delivered) has grown.
20. Adoption and utilization of previously purchased subscriptions.
21. COVID-19 (no surprise there), resulting in adapting to more VILT classes; Developing more self-paced, on-demand training as an alternative to ILT classes
22. Introduction of Training Credits program; COVID forcing us to a 100% virtual (live-online) schedule.
23. Running VILT classes in multiple time zones simultaneously. Adoption of the certification exams and programs.
24. Transitioning to subscription sales vs. public class sales
25. Difficult in getting data. Unwillingness by executives to invest in on-premise products.
26. Pace of content development; Sales Pipelines
27. Hiring & core organization of course writing methodology.
28. Bringing new people up to speed and employee turnover; Increased customer demand
29. Matching the volume of credentials awarded as of last year at the same time. When everyone was in lockdown, everyone was looking to reskill. Another major challenge has been in delivering and getting the exec-level to understand our training and credentialing strategy for the year.
30. Customers' ability to travel.
31. Free training requests; limited resources to develop new contents and deliver globally

## EMEA

1. License attach in large parts of EMEA is still difficult
2. Encouraging product sales to attach our new e-learning subscriptions to deals. Still working to convert remaining ILT classes to VILT.
3. Resourcing remains a challenge. We shrunk the team last year due to the poor performance of the business at that stage, and have also had some long term sick leave. We are now hiring again (isn't everyone) and using Partners & subcons where we can. Upskilling the team. With everyone

so busy, it's proving somewhat challenging to carve out the time for the team to learn the new technology that we're now teaching our customers.

4. Show the value of learning for customers and sales team.
5. Resourcing of trainers
6. Covid 19 impact
7. Moving to freemium model is putting pressure on revenue. Push to move to subscription model
8. No dedicated education sales team. Low education sales attach rate
9. Continued sharp business decline in our central European "Geo", due to local internal organizational issues and re-focusing. Many EMEA countries still in recovery from pandemic; business recovery is proving slower for EMEA than other Regions
10. Content development; Certification program changeover.
11. Loss of instructors and bandwidth for German customers
12. Only have 1 or 2 people booked on classes, do we run or cancel. Delegates waiting for face to face classes to resume.
13. Covid-19: pivoting to 100% virtual and online proctored certification
14. A volatile climate with many individuals, internal and external in a very stressed mind set
15. Motivating customers to move back from free to fee given the rise in free material available from other Departments and available online.
16. CMS / LMS integration with ATP's.
17. Training budget constraints; Larger projects delayed
18. New sales are lower than usual, currently using Prepaid credit but impact will be felt eventually.
19. COVID impact on ILT business
20. Over utilisation.
21. Free training offers or expectations for these; resourcing limits in development and delivery

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

### **Worldwide**

1. 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.
2. Seeing good recovery of the business, since the impact of Covid. Customers more accepting of learning remotely, VILT, rather than travelling. Revenue returning to near 2019 levels.
3. The trend of free conference tickets are changing expectations for discounts and free passee
4. Customers requesting more virtual offerings or blended approaches; Digitalization and gamification becomes a main part of the learning methods
5. Still slow due to Covid19
6. Continuous growth

7. 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.
8. In 2020 we did make a 4 hour instructor-led Foundation course available at no charge and we still have limited attendance, customers are more likely to take our self-paced. We are considering making all our foundational/entry level content free to the Administrators of our software. In Jan of 2019 we made 75% of our on-demand content freely available to the public. our revenue has decreased as expected since we made so much of our on-demand content available for no fee. We don't have enough data yet to say that the customers/prospects that are engaged in the free training are purchasing more licenses or more likely to renew, but we are hoping to be able to correlate that data yet this year.
9. Transforming any business is difficult. Transforming a learning business has its own unique set of challenges. We are learning as we go but see good progress, quickly.
10. Introduction to the market - VILT
11. We have pivoted (rather seamlessly) to virtual and On Demand delivery of all our training content. Our latest quarterly results were very strong, indicating that we are (knock wood) recovering nicely from our Covid-19 trough last year.
12. Companies spending less on Training budgets.
13. We are a newer education services organization since Mar 2019 of our first paid delivery and our official Academy launch in April 2021.
14. 2020 through to mid-2021 was challenging largely because of COVID and the uncertainty around budgets. Overall, the business saw customers holding back on spend in order to protect employees' jobs while they figured out the uncertainty in the market - and training budget is one of the "easy" cuts for customer organizations to make.
15. At Q2, we invested a lot of our budget to self-paced online training development efforts. given the pandemic situation. We are not seeing adequate takers for the Certification program within Q2.
16. Continued proliferation of training orgs such as Udemy, Pluralsight, Coursera, O'Reilly, and others are offering great value and closing more B2B, enterprise enablement deals which require vendors to focus on advanced and differentiated training.
17. We are trying to reduce churn at a corporate SaaS level, and training is one way to help that cause

## EMEA

1. We are seeing good recovery since the impact of Covid, with revenues returning to near 2019 numbers.
2. We have seen a pleasing increase in training bookings over the past couple of quarters, which is a good comeback following a very slow start to the year.
3. We experienced a solid most recent quarter; indications are that we can expect this positive trend to continue throughout the rest of the year
4. Instructor travel is returning to the conversation. No travel yet, but discussions are beginning.
5. Training revenues are still seeing a 20% drop in virtual classes, but ATPs have seen a 15% increase
6. Big move to Self-Paced acceptance.
7. ATP's core revenues heavily impacted as they switch to 100% virtual.



8. Customers have a shorter attention span for online learning. We adapted courses for shorter days and more interactive sessions. We are starting to get enquiries for classroom courses but have yet to re-open.
9. Considering hybrid training as travel restrictions ease in some locations.
10. Customer booking later and later which can cause admin issues

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