



Computer Education Management Association
Europe

CEdMA Worldwide Training Market Barometer 3rd 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 31 inputs for world-wide (four of which were North America only) and 22 for EMEA.

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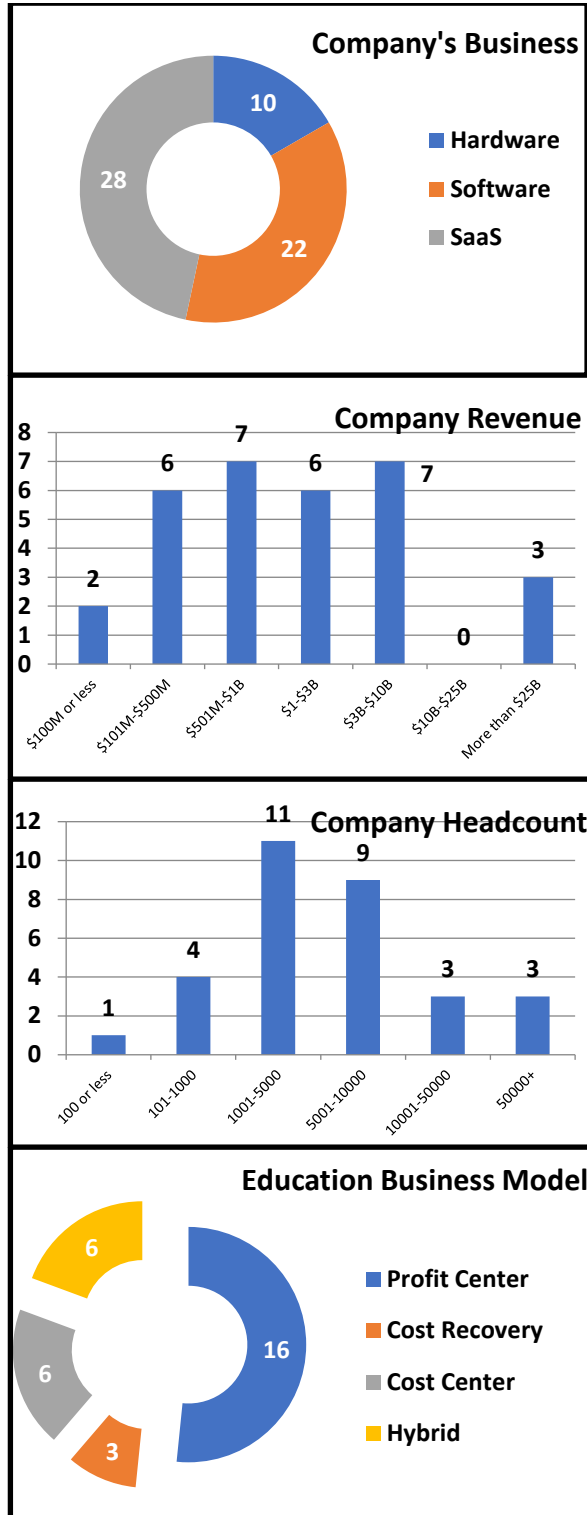
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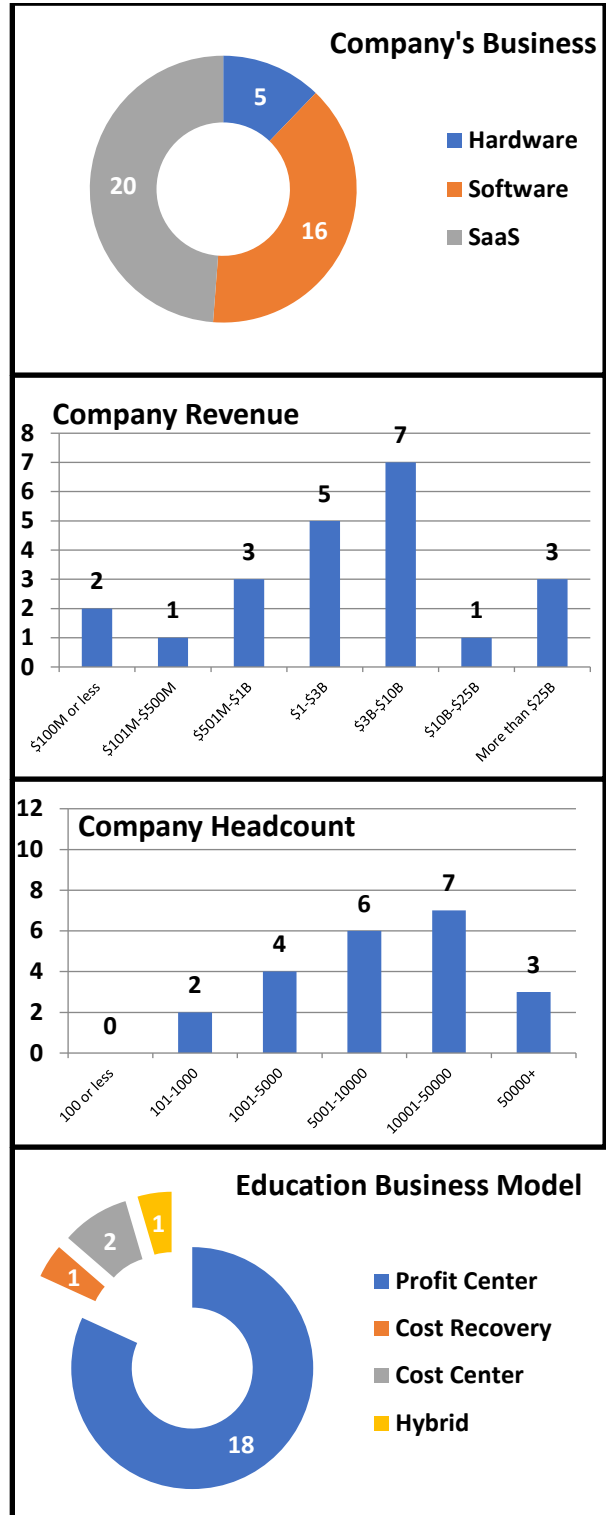
Member Profiles

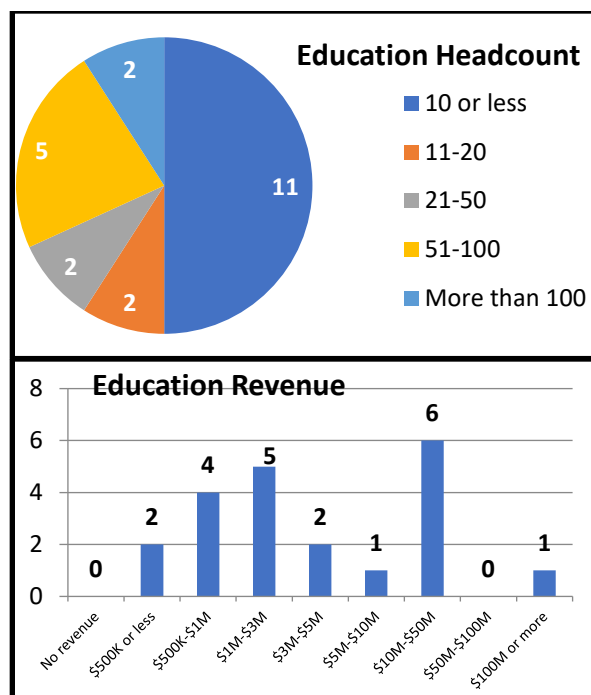
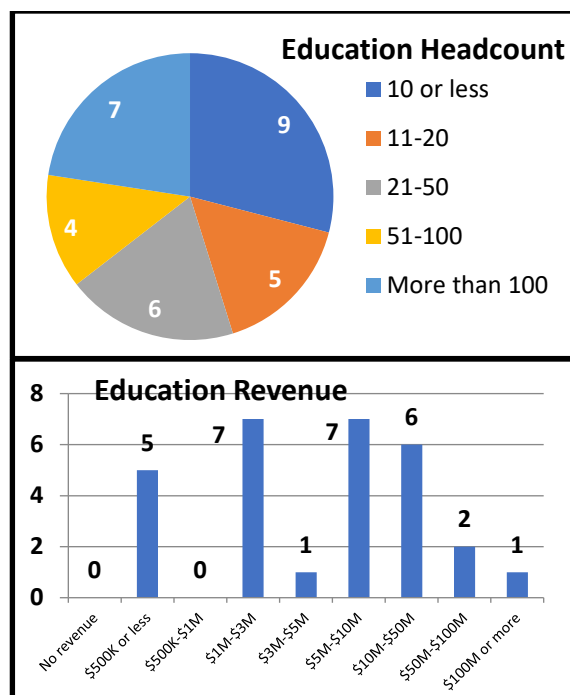
Sample size for 21q3 was 31 for Worldwide and 22 for EMEA.

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 6% through 21q3.

EMEA: Having been down to negative 2% in 2014, the trend recovered to positive 2% increase in 2016, positive 4% in 2019 then negative 3% in 2020 but is now again positive 4% through 21q3.

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

WW: The growth trend is back up to 4-5% at 21q3. Cost reduction by larger members has helped bring the figure back to this from a recent dip into negative territory.

EMEA: The trend has recovered from a low of negative 1% during 2020 to showing flat through 21q3.

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 9% through 20q4, but flat through 21q3.

EMEA: It fell to negative 7% during 2020, but is now 3-4% through 21q3.

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 has risen steadily from 2% in 2017 to 10% through 21q3 with very little live training.

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

WW: The trend dropped to negative -10% in 2020 but is now showing negative -5% through 21q3.

EMEA: The trendline was negative -11% in 2020 but is now negative -4% through 21q3.

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

WW: The trend dropped to negative -10% in 2020 but is now showing flat through 21q3.

EMEA: The trend dropped to negative -9% in 2020 but is now showing positive 1% through 21q3.

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 21q3, having grown steadily from a 5% increase in 2013 and even 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 dropped back to 5% increase year on year in 2020 but is now showing 9% through 21q3. 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 2020 and 2021 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 21q3 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 9% through 21q3.

EMEA: The increase was 3% in 2018 but slipped to flat in 2019 but now is back up to 9%.

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 21q3 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 -6% following a significant recent downturn. But with only four 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 5%.

EMEA: The trend has jumped from a steady 1% to positive 8%.

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

WW: Subscription revenue increase has grown from 7% during 2017 to 9% during 2019 to now 11%.

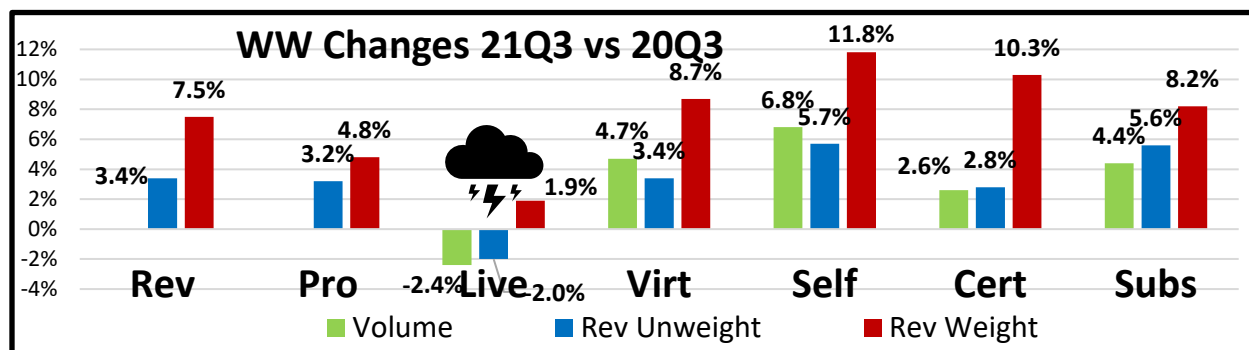
EMEA: With many companies just starting in 2015/16, the increase was 8% over 2016, dipped to 3% in 2017, rose to 11% in 2019, fell back to 8% in 2020 but is now 10-11%.

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Volumes as well as revenue

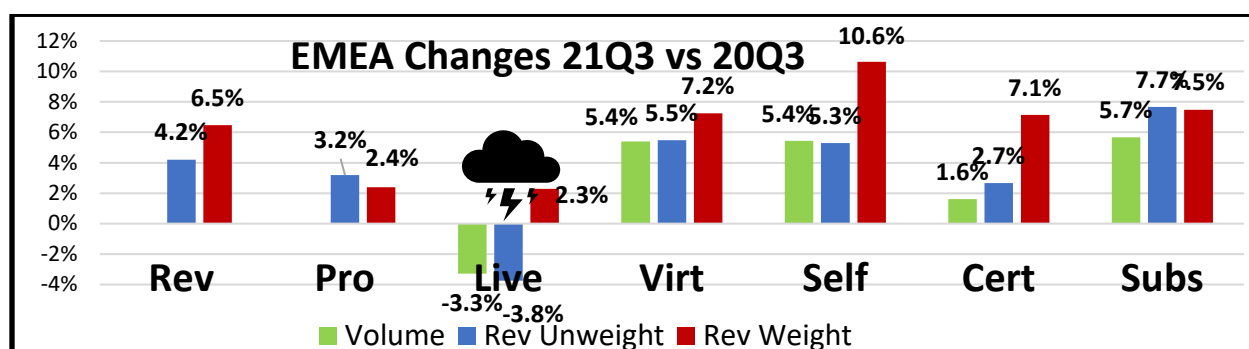
We now ask for percentage movement of modalities by volume of students in addition to or instead of revenue. Of course, volume averages will only be for unweighted input. Here's the comparison for 21q3.

WW	Rev	Prof	Live	Virtual	Self	Cert	Subs
Volume			-2.4%	4.7%	6.8%	2.6%	4.4%
Revenue Unweighted	3.4%	3.2%	-2.0%	3.4%	5.7%	2.8%	5.6%
Revenue Weighted	7.5%	4.8%	1.9%	8.7%	11.8%	10.3%	8.2%



The significant revenue increases for 21q3 compared to 20q3 are revenue, virtual instructor-led, self-study, certification and subscriptions. Live instructor-led is coming back slowly.

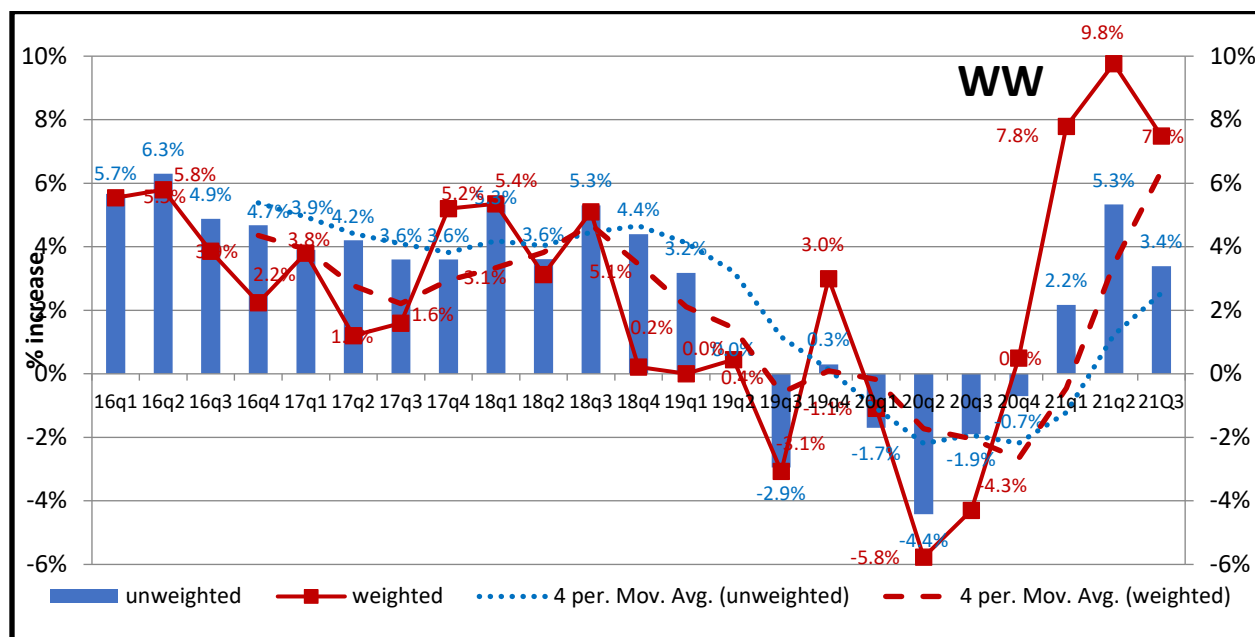
EMEA	Rev	Prof	Live	Virtual	Self	Cert	Subs
Volume			-3.3%	5.4%	5.4%	1.6%	5.7%
Revenue Unweighted	4.2%	3.2%	-3.8%	5.5%	5.3%	2.7%	7.7%
Revenue Weighted	6.5%	2.4%	2.3%	7.2%	10.6%	7.1%	7.5%



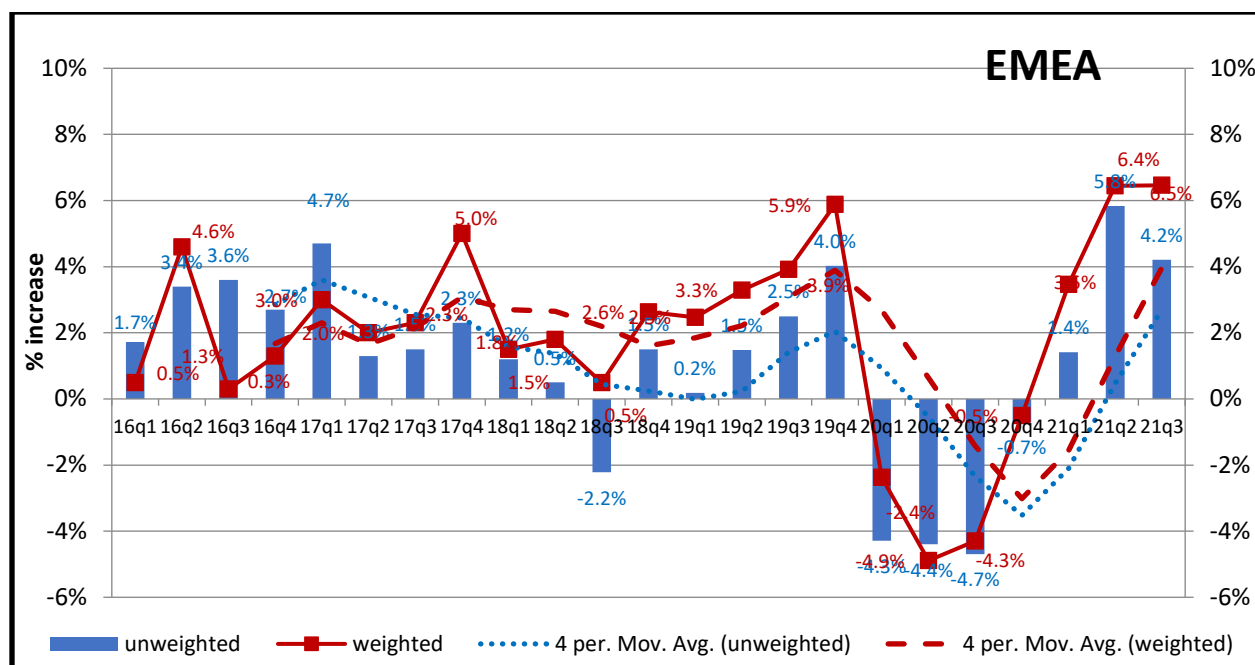
The significant revenue increases for 21q3 compared to 20q3 are revenue, virtual instructor-led, self-study, certification and subscriptions. Live instructor-led is coming back slowly.

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Overall Training Revenue



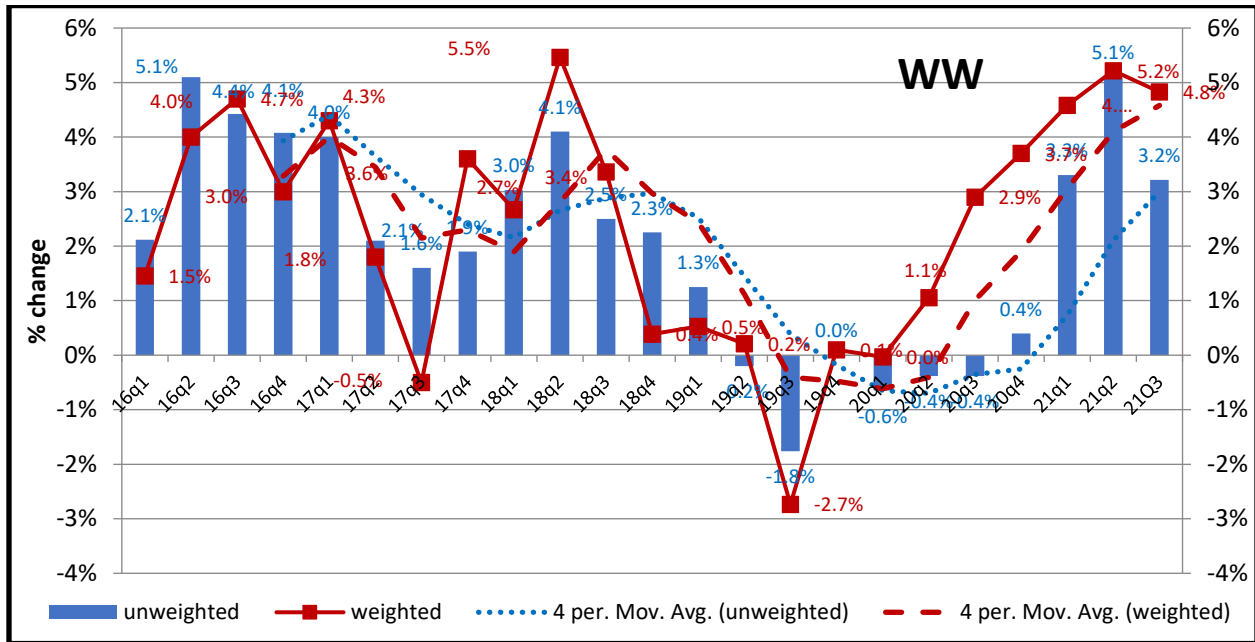
The unweighted total training **revenue** increase for 21q3 (u=20, f=3, d=8) was 3.4%. However, the weighted total training **revenue** increase was 7.5%. The 4-period moving average is currently showing positive 6% for weighted.



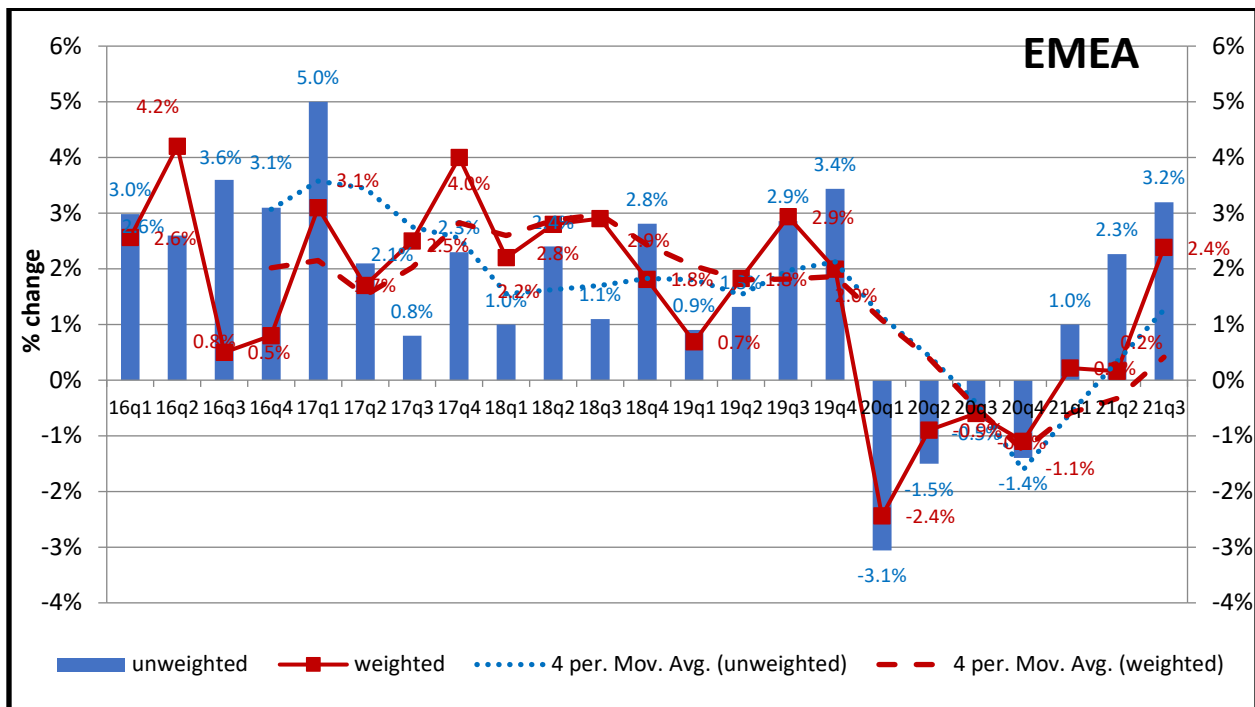
The unweighted total training **revenue** increase was 4.2% in 21q3 (u=16, f=3, d=3). When considering the weighted numbers, it was 6.5%. The weighted trendline shows a increase of 4% over the last four quarters when size of company is considered.

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Training Profit



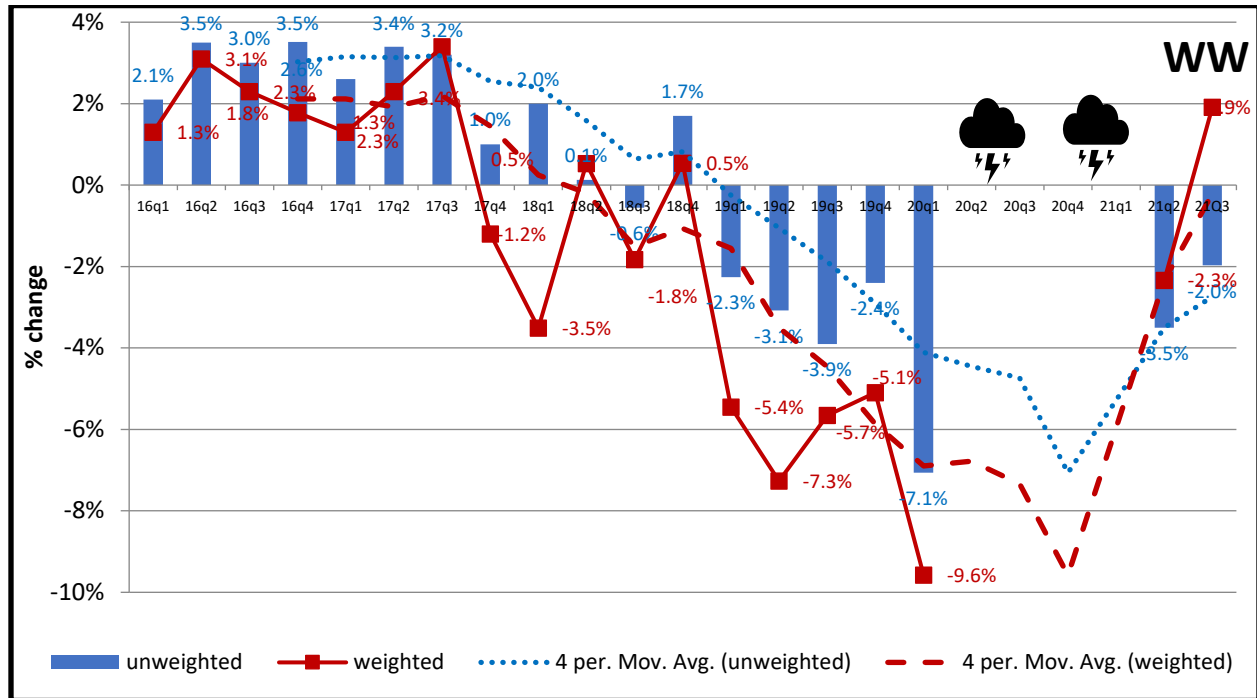
Training profit in 21q3 (u=16, f=6, d=5) increased 3.2% for unweighted and 4.8% for weighted. The training profit weighted trendline has recovered to positive 4-5%.



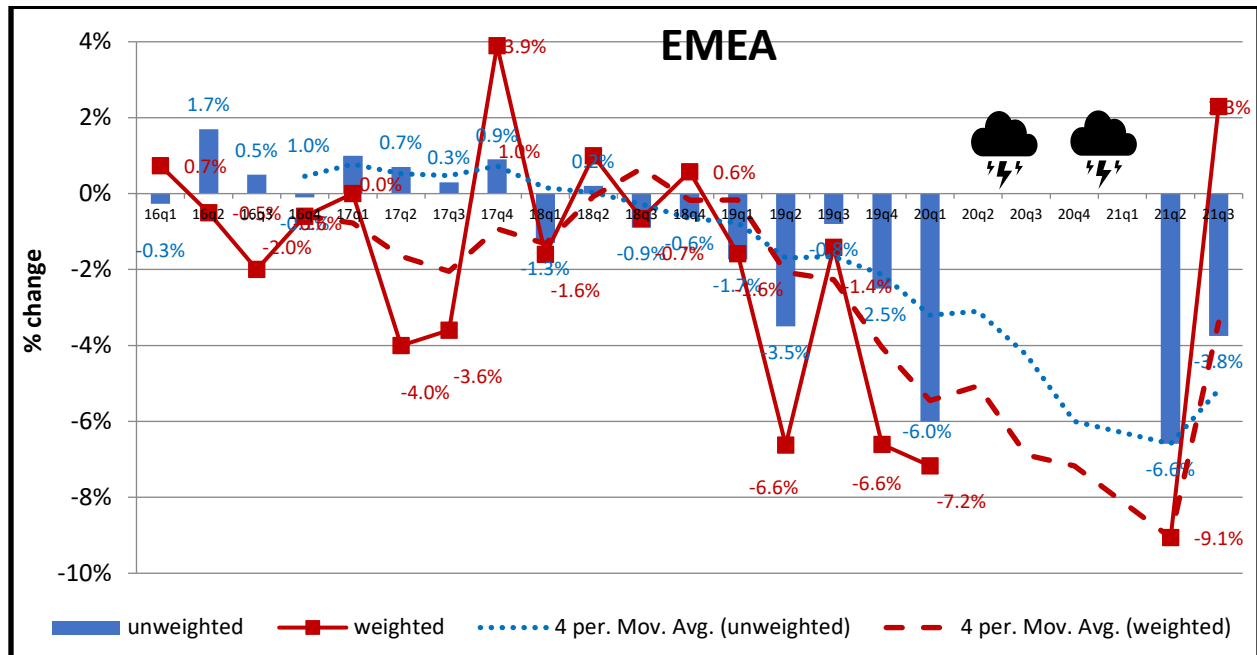
The unweighted total training profit rose 3.2% in 21q3 (u=13, f=3, d=2). And, with the weighted numbers, there was also an increase of 2.4%. The weighted trendline shows flat for the last four quarters when size of company is considered.

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Live Instructor-led Training



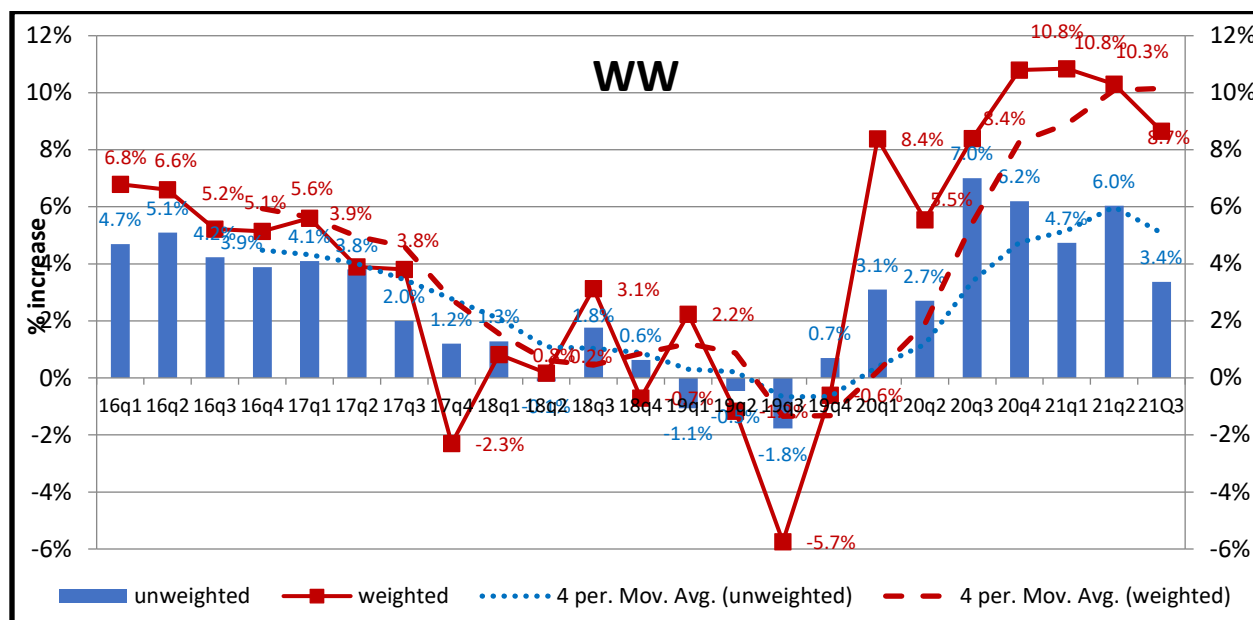
Live instructor-led training is back for 15 members (u=3, f=4, d=8) which leaves the unweighted change of negative -2.0% but positive 1.9% when weighted. The weighted moving average is flat



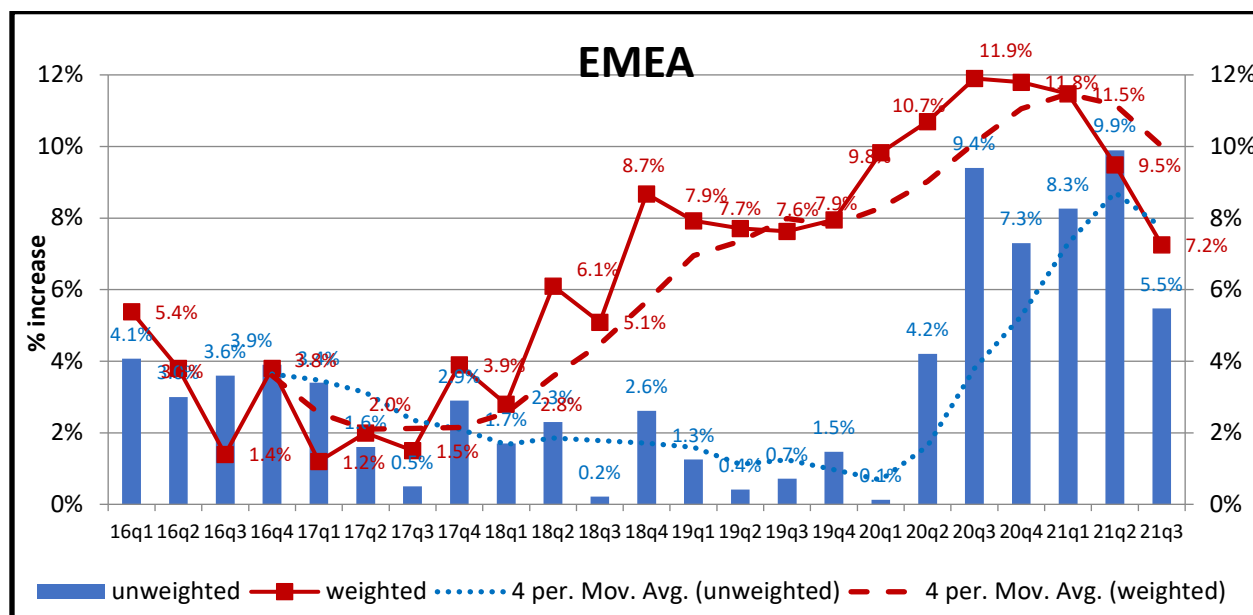
Live instructor-led training is back for 12 members (u=2, f=6, d=4) which leaves the unweighted change of negative 3.8% but a positive 2.3% when weighted. The weighted moving average is negative at -3%.

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Virtual Instructor-led Training



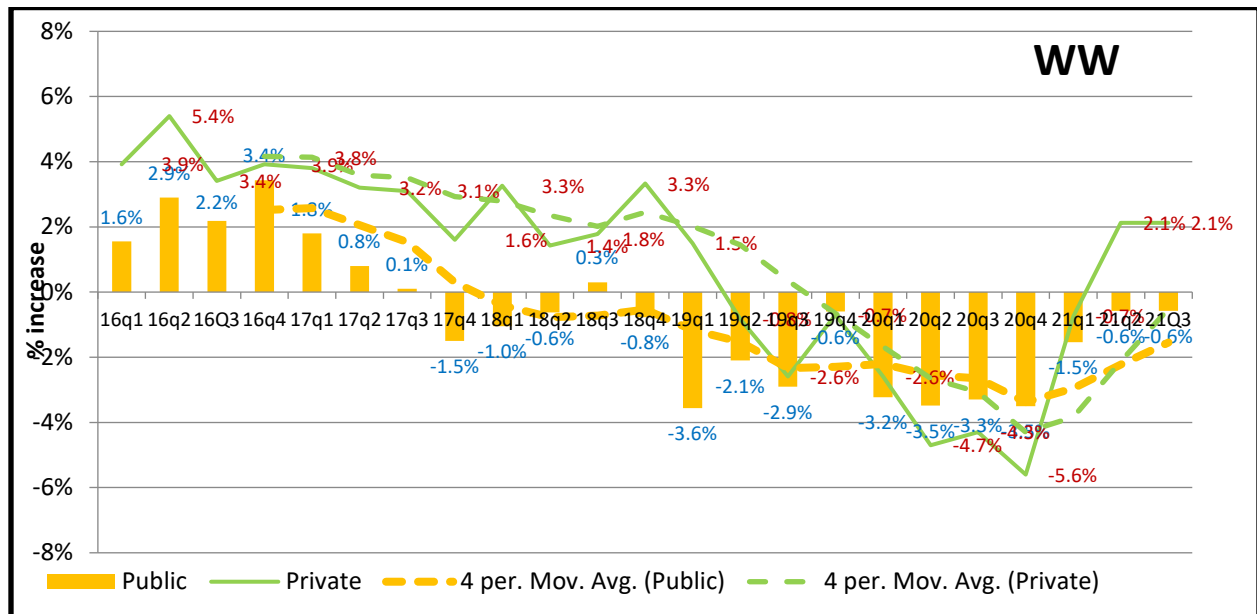
Virtual classroom has continued its upturn. The unweighted virtual classroom **revenue** increase for 21q3 (u=18, f=2, d=9) was 3.4%, with the weighted **revenue** increase at 8.7%. The increase in **volume** was 4.7%. The 4-period moving average for weighted is 10%, up from 3% in 2017 and -1% in 2019. COVID-19 sparked this recovery.



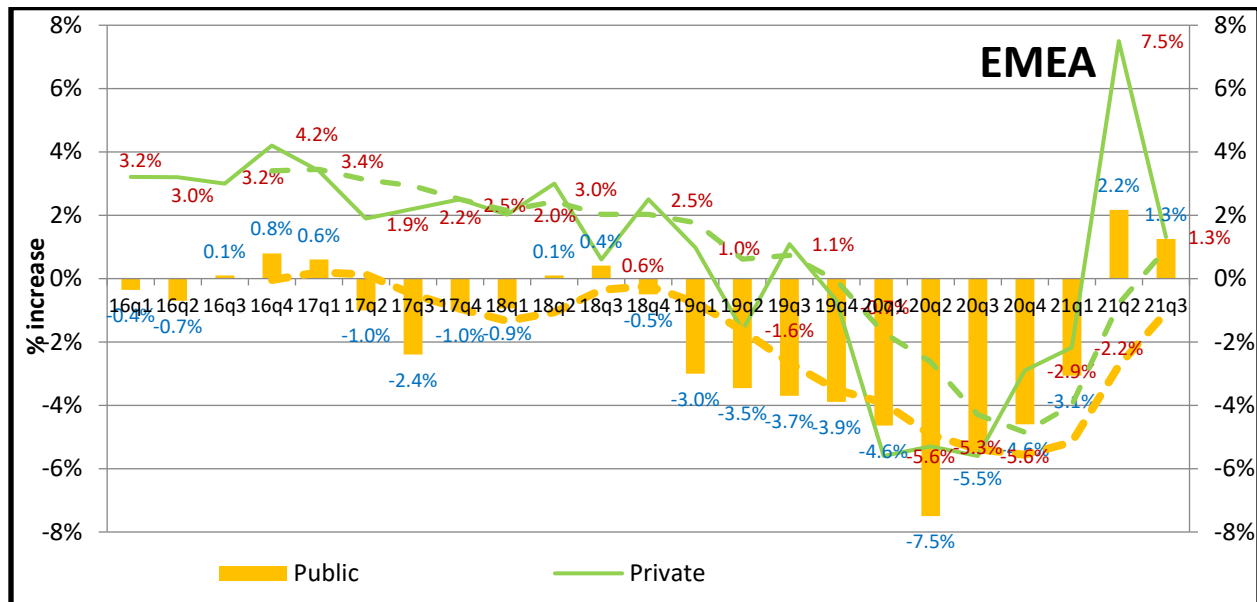
To compensate, the VILT increase continues. The unweighted 21q3 **revenue** increase is 5.5% (u=16, f=3, d=2) and the weighted increase 7.2%. The increase in **volume** was 5/4%. The weighted trendline shows an ongoing VILT increase of 10% when size of VILT revenue is considered, but it was 3-4% in 2016 and 8% in 2019, having been 1% in 2014.

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Public v Private Unweighted



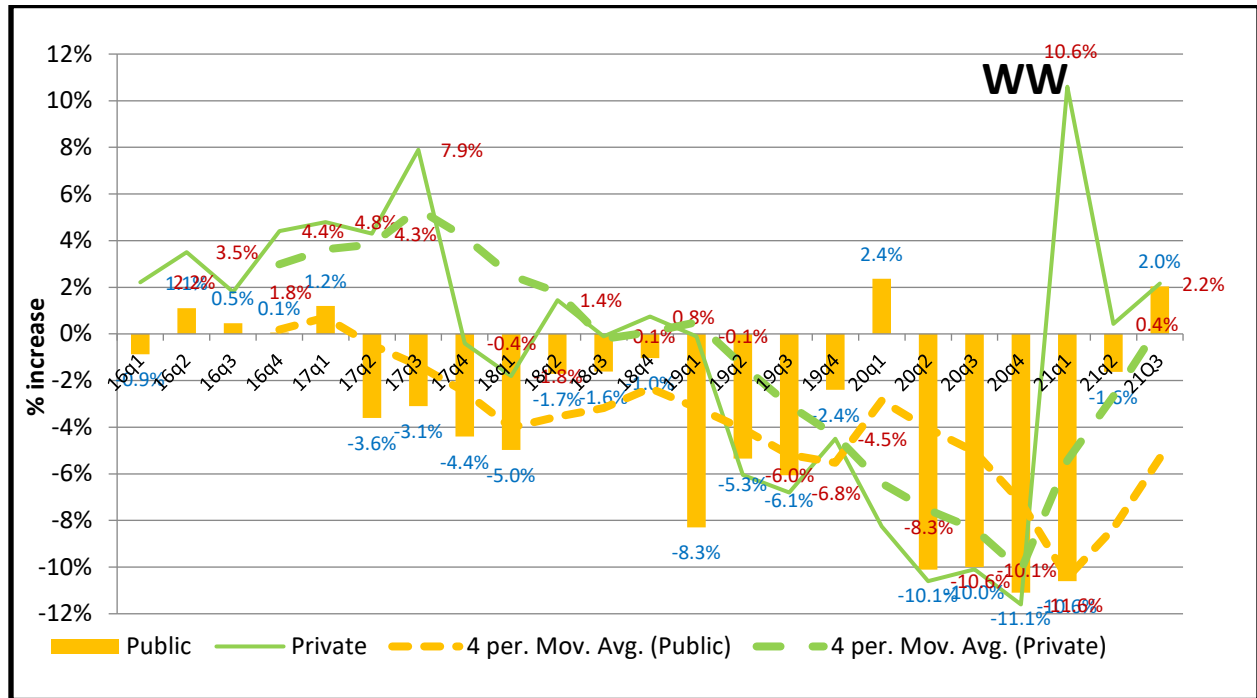
We include questions on public classes and private classes. Unweighted public **revenues** have decreased in 21q3 by -0.6% and private increased by 2.1%. The increase in **volume** was 1.3% for public and 1.4% for private. The trendline is now negative -2% for public but flat for private. (Note that public is u=10, f=6, d=10 and private u=13, f=8, d=6.)



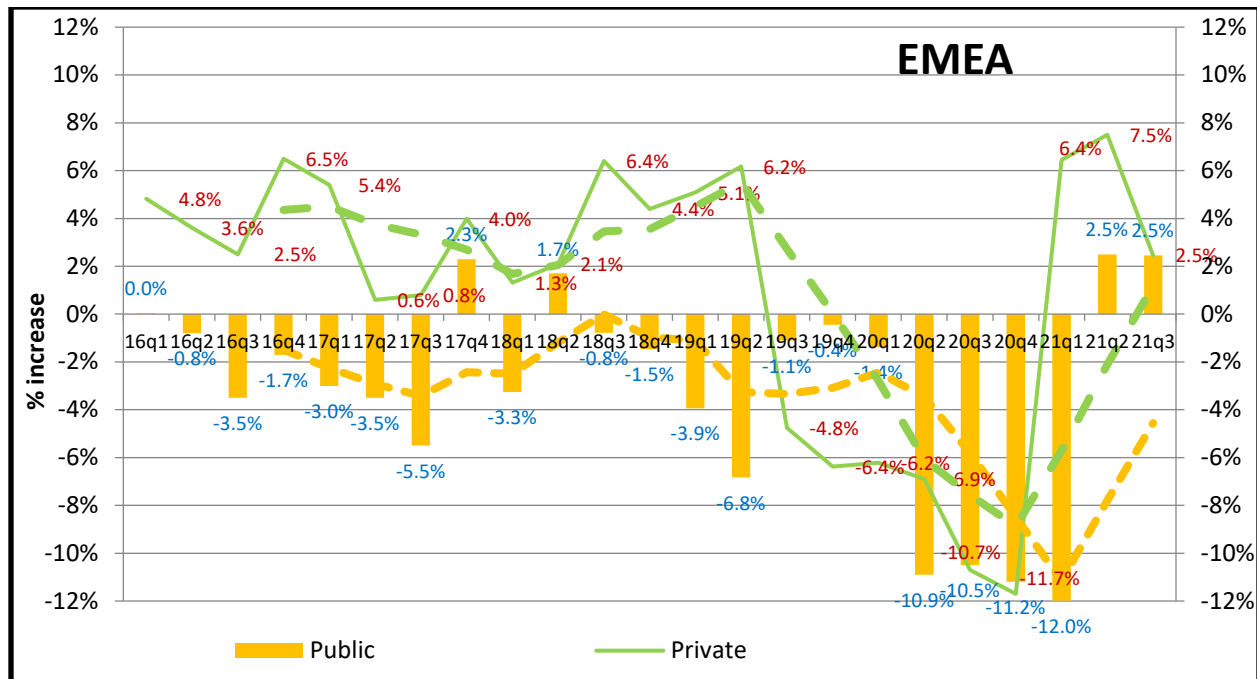
We are now asking you to forecast both public (u=9, f=8, d=3) and private (u=11, f=4, d=6) classes and have enough history to show that private classes show **revenue** is increasing 1% over the last four quarters, and public classes are decreasing -1%. **Volumes** increased 1.0% for public and 3.3% for private. This shows unweighted values.

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Public v Private Weighted



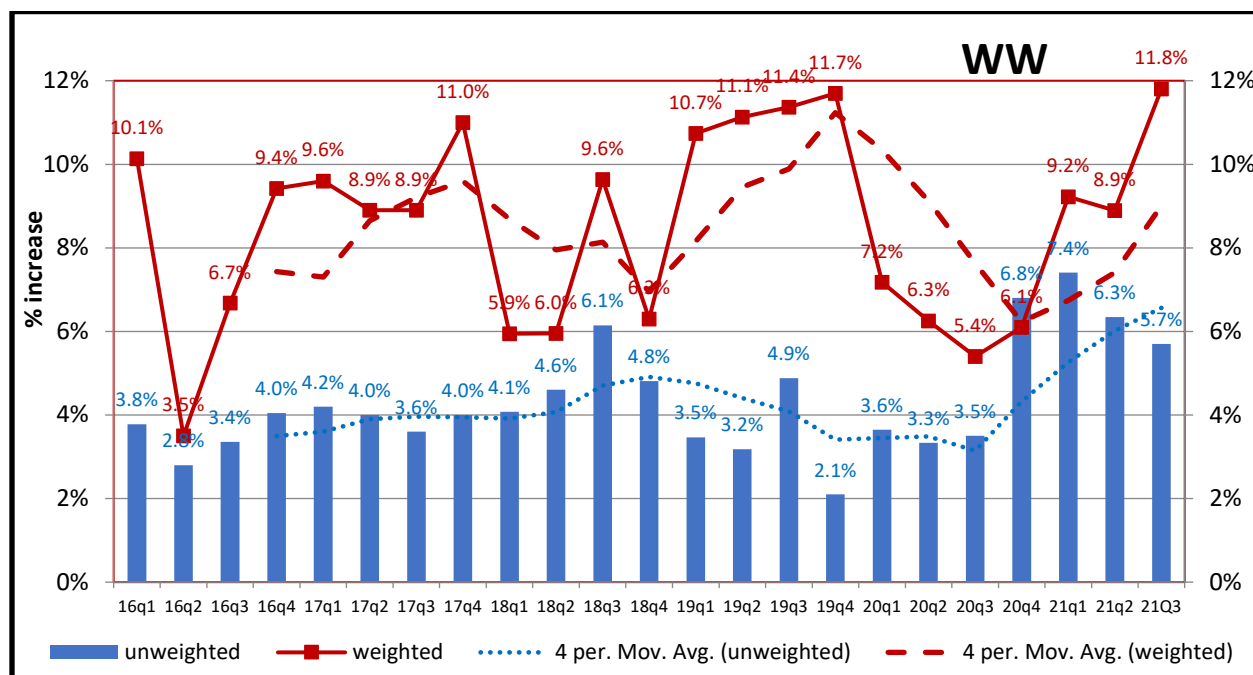
When weighting is considered, the changes from 21q1 are also dramatic. In 21q3, public **revenue** has increased by 2.0% and private **revenue** increased by 2.2%. The 4-period moving average is negative -5% for public but flat for private.



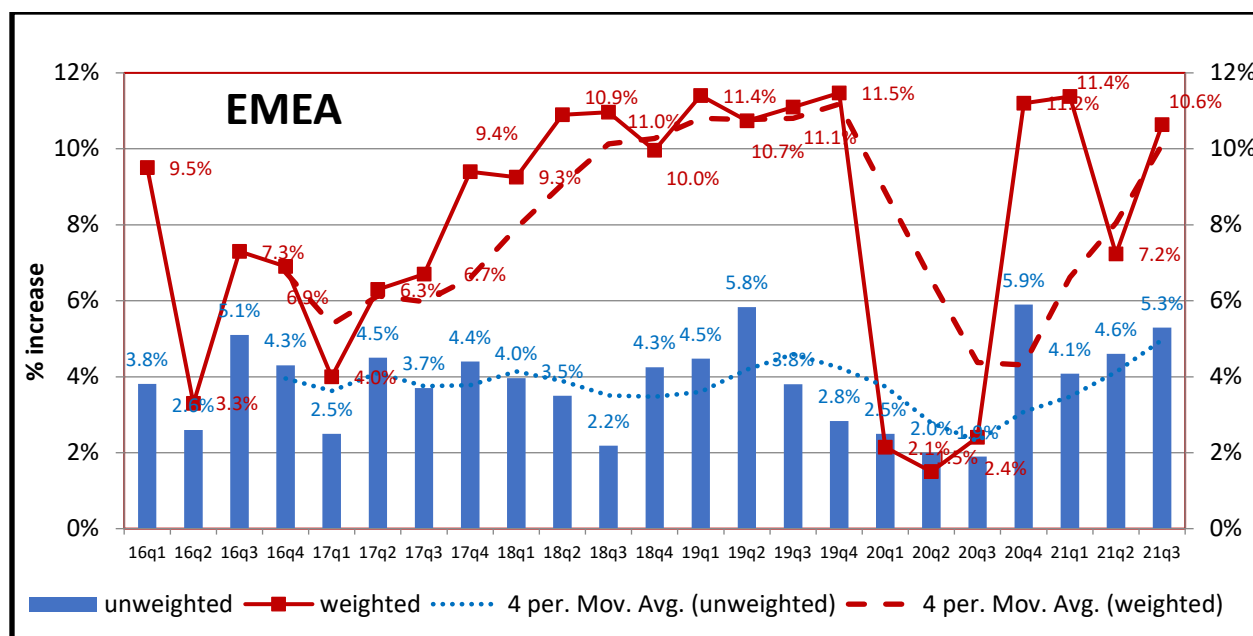
Weighted values have the **revenue** trendline for public showing negative -5%, but private positive 1%.

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Self-Paced



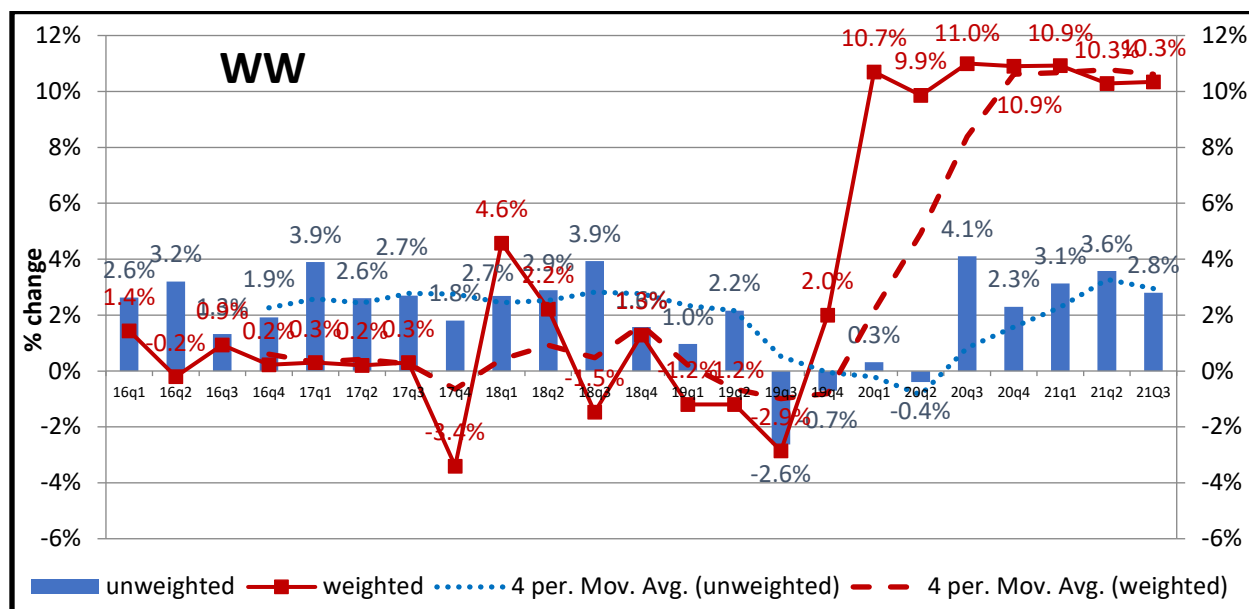
The unweighted self-paced **revenue** increase in 21q3 (u=18, f=4, d=3) was 5.7%. However, the weighted self-paced **revenue** increase was 11.8%. The increase in **volume** was 6.8%. The 4-period moving average shows 9% for weighted.



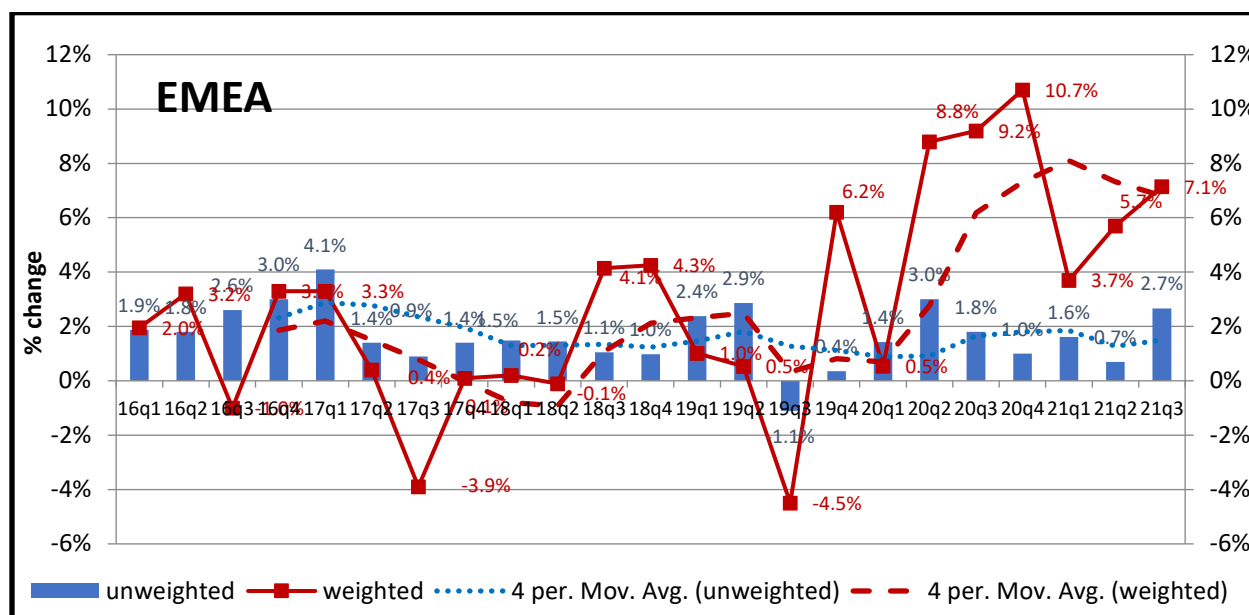
The results for 21q3 (u=11, f=3, d=3) were 5.3% increase unweighted and 10.6% increase weighted. The increase in **volume** was 5.4%. Larger companies still have a significant effect on these averages. The 4-period moving average is 10% increase for weighted, with companies back to charging for self-study.

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Certification



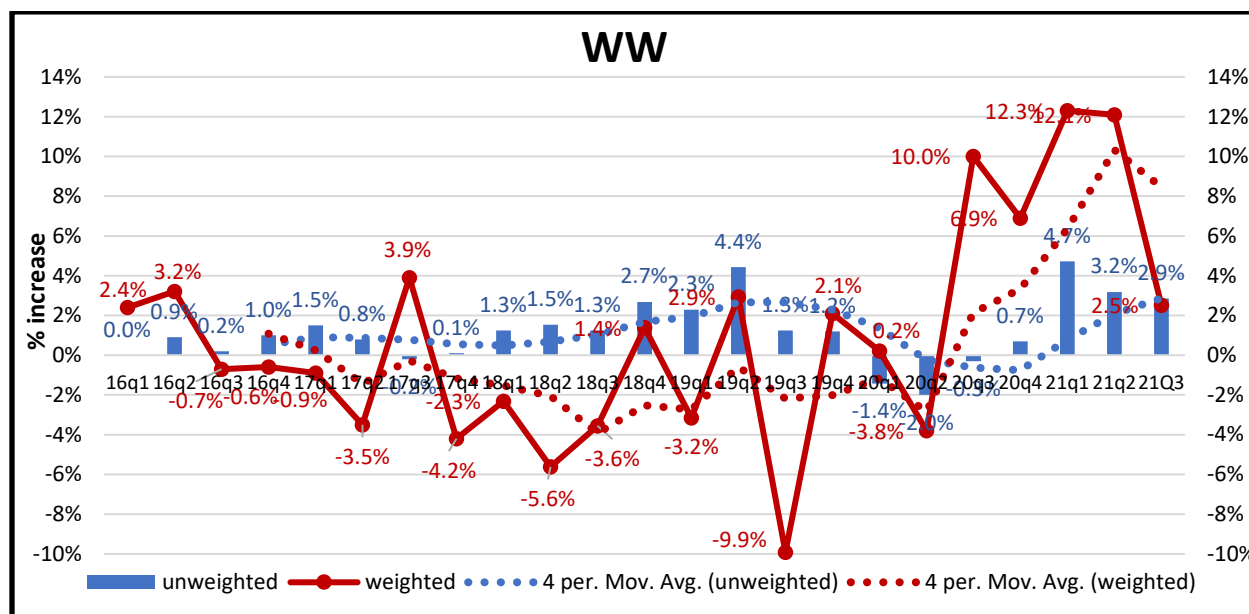
The unweighted certification **revenue** increase for 21q3 (u=14, f=7, d=4) was 2.8%, and the weighted certification **revenue** increase was 10.3%. **Volume** was an increase of 2.6%. The weighted 4-period moving average is 11%. Customers and partners may be taking advantage of the pandemic for re-skilling and certification exams.



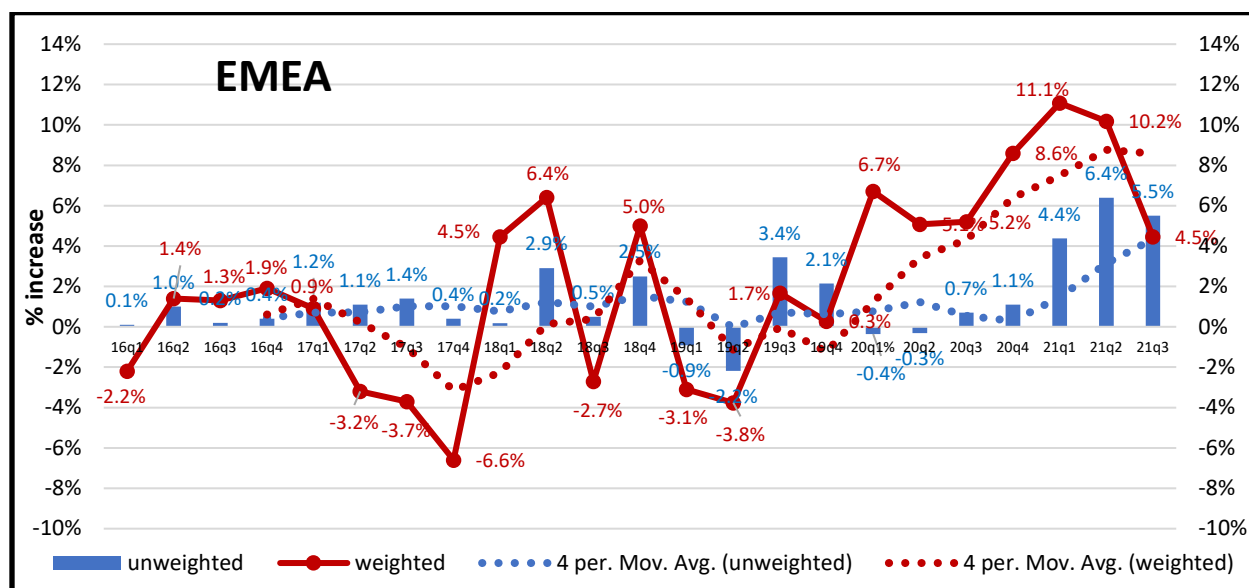
Certification has shown several swings over the last four years. However, the latest large increase has probably resulted from the push by partners and customers to certify more staff. The increase in **volume** was 1.6%. The **revenue** increases for 21q3 (u=8, f=5, d=2) are 2.7% for unweighted and 7.1% when weighted. The weighted 4-period moving average is 7%.

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Learning Consulting



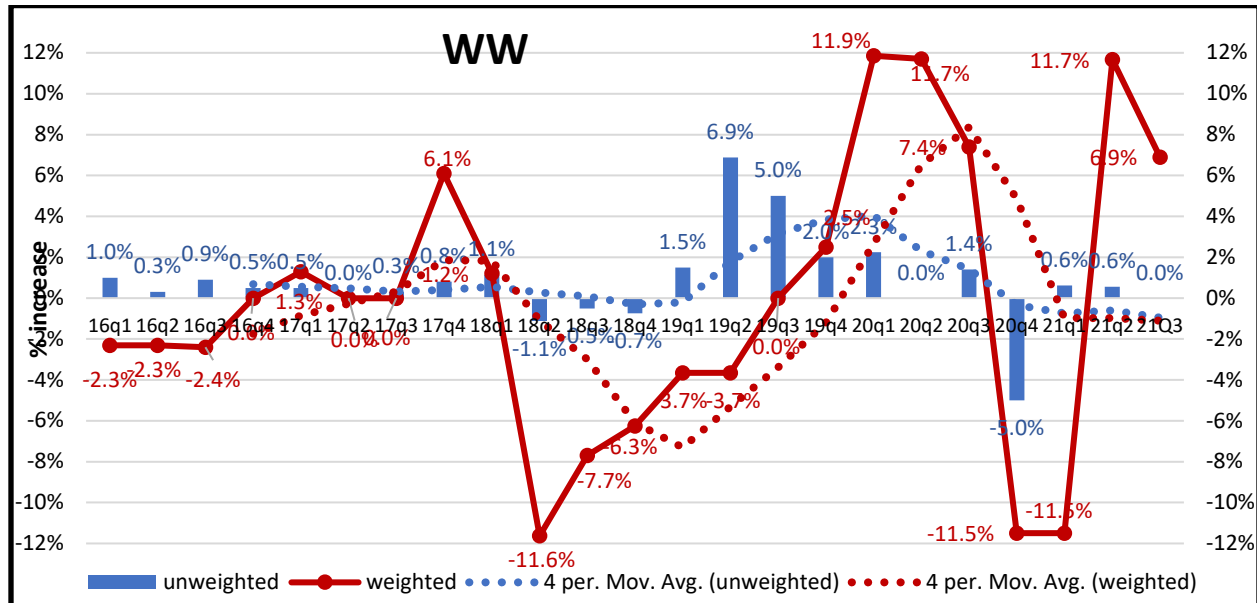
We now have over five years reporting this area. Weighted scores have been volatile and show a moving average of positive 9%. The decrease in **volume** was negative -0.8%. The **revenue** changes for 21q3 (u=4, f=3, d=0) are 2.9% for unweighted and 2.5% when weighted.



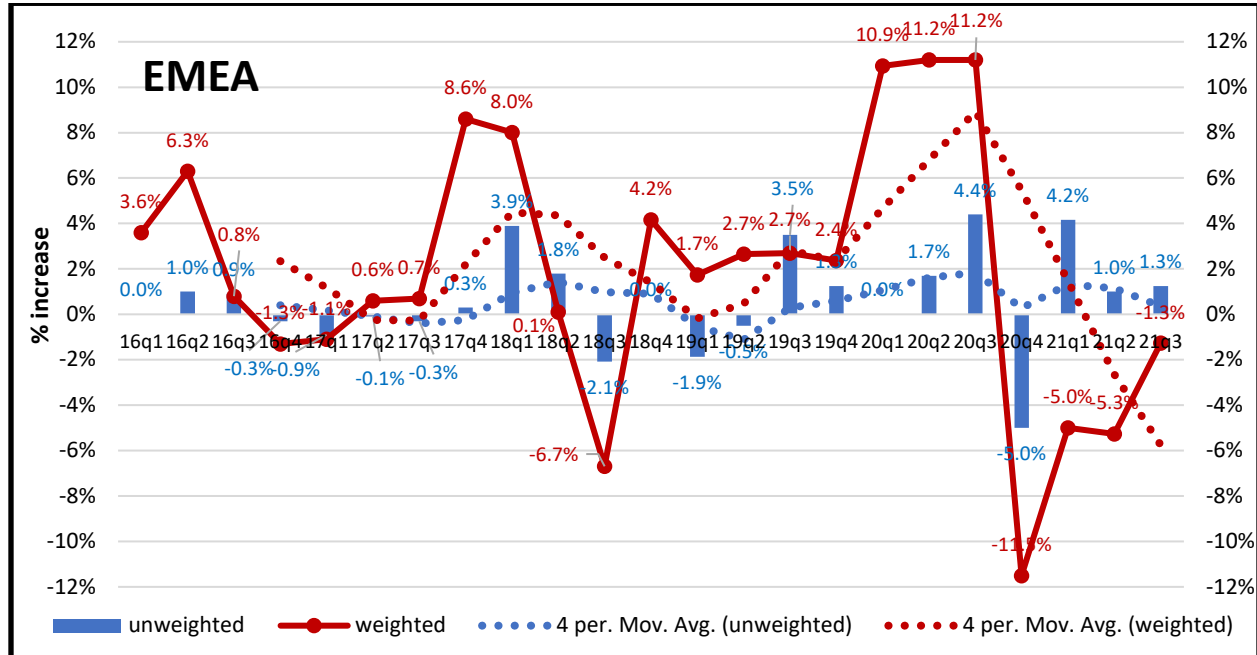
We now have over five years reporting this area. In that period, the unweighted scores have largely remained flat. However, weighted scores have moved dramatically. The **revenue** increase for 21q3 (u=3, f=2, d=0) is 5.5% for unweighted but 4.5% when weighted. **Volume** increased 2.8%. The current four-period average for weighted is 8-9% increase.

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Learning Technologies



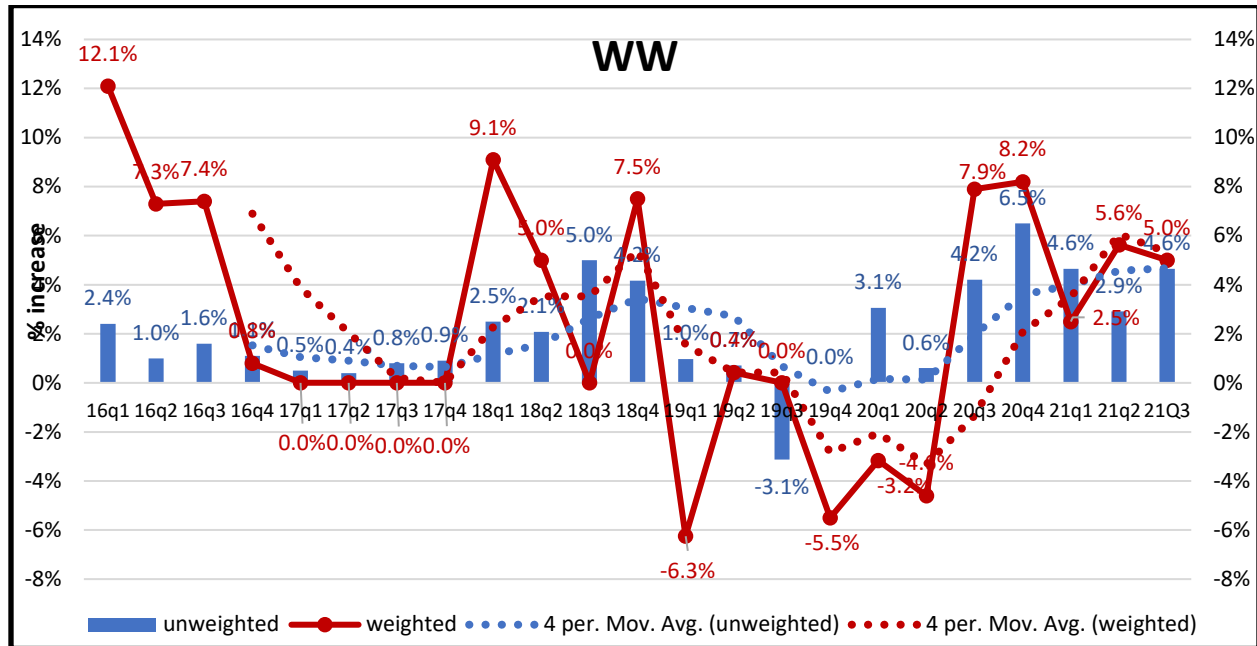
We also now have over five years reporting this area. The trendline for weighted scores has dropped to just below flat, maybe caused by no onsite work allowed. The **revenue** increase for 21q3 (u=3, f=1, d=1) was flat for unweighted and 6.9% when weighted.



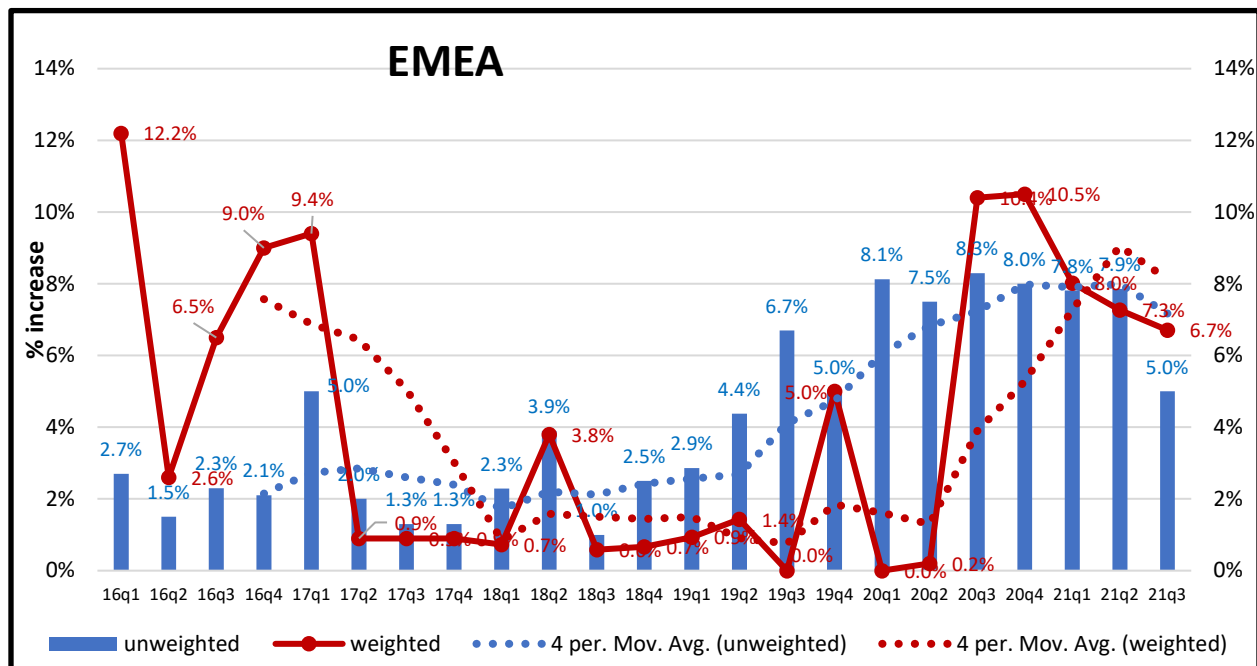
We also now nearly five years reporting this area. In that period, the unweighted scores have recently shown a little volatility. The **revenue** increase was 1.3% for 21q3 (u=2, f=0, d=2) for unweighted and a -1.3% decrease when weighted. The trendline for weighted is down to negative -6%.

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New Learning Modalities



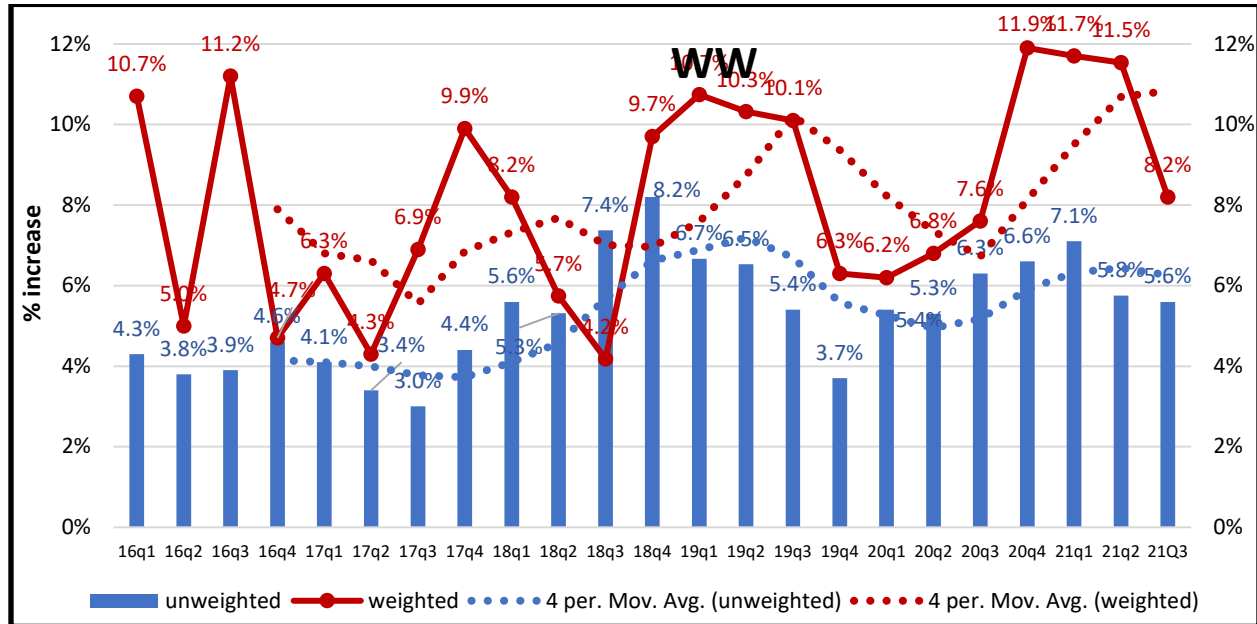
We now have 23 quarterly reports. In the last 12 months, the trendline for weighted scores is positive 5%. The increase in **volume** was 1.7%. The **revenue** for 21q3 (u=5, f=2, d=0) is 4.6% for unweighted and 5.0% for weighted.



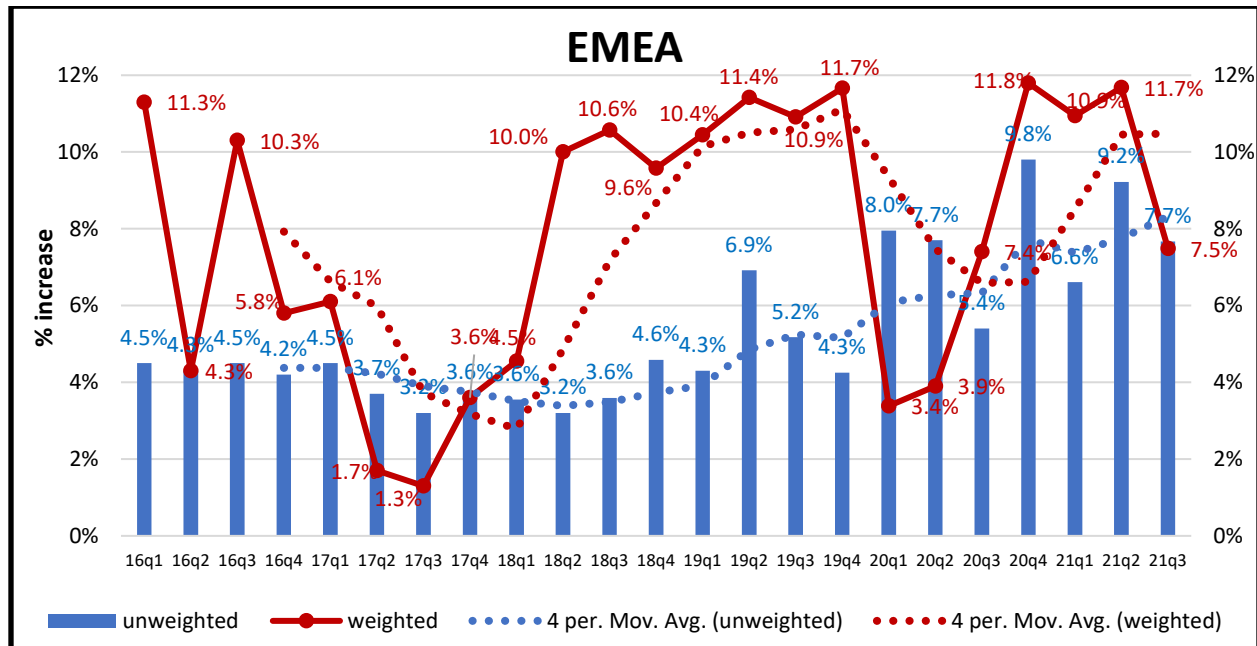
The unweighted trendline is 7%, while the weighted trendline shows 8%. The **revenue** increase for 21q3 (u=4, f=2, d=0) is 5.0% for unweighted and 6/7% for weighted. The increase in **volume** was 3.3%.

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Subscriptions



We also have 23 quarterly reports here. Currently, the weighted trendline is 11%. The **revenue** increases for 21q3 (u=15, f=4, d=2) are 5.6% for unweighted and 8.2% for weighted. The increase in **volume** was 4.4%.



The unweighted trendline is 8%, with the weighted trendline 10-11%. The **revenue** increases for 21q3 (u=13, f=1, d=1) are 7.7% for unweighted and 7.5% when weighted. The increase in **volume** was 5.7%.

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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. Learn Online offering that runs as virtual bus schedule sessions; Self Paced, embedded into Software
3. We had new product features released for which we needed to create new training programs for. This was where we found our biggest increases.
4. Self-paced learning, online learning and hands-on labs.
5. Subscriptions
6. Administrator Training (based on a new platform); Certification due to program relaunch.
7. Attendance in our free Insider Risk Detection workshops increased by 500% from the first two quarters of the year (cumulative) to the third quarter of the year.
8. Cloud-based products continue to overtake our portfolio
9. VILT
10. Self-Paced
11. Subscriptions
12. Public VILT fill rates
13. Growth in our new e-learning subscription offering (self-paced).EDU is recovering from impact of Covid, our Teacher-training sessions have recovered well.
14. We launched 5 new certifications in the last 6 months. We had a record high of training sales last quarter. We are new and had little revenue last year.
15. API Mgt
16. Core product training
17. Fundamentals partner specialisation
18. Cloud, Storage; GRID
19. Self-directed Learning and Certification exams
20. Installation/provisioning topics, operations, advanced technical topics, best practices
21. Industry classes and certifications
22. We continue to see strong VILT enrolments and volume growth. The anticipated (and in certain countries, hoped for) return to "live" ILT has not yet occurred, as Covid remains a drag on certain Geos. Our eLearning/On Demand training continues to accommodate more users than ever before, and should grow to 12% of our total orders/revenues during next year. Relative to our past performance Product Attach and Support Contract Attach orders are both growing significantly y/y, though our performance against industry norms and benchmark in these Attach areas remains below par. Our Storage, Linux, and Security portfolios achieved the greatest y/y growth in the past 6 months. 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.
23. Training consulting hours, subscriptions and one onsite class
24. IP Audio Essentials; ACS (VMS); Multisensors; Camera Interface; Perimeter protection; Inner area protection; Body Worn; IP Intercoms; Analytics
25. Uptake virtual public ILT

26. We saw a large increase in the digital marketing topics of email marketing, social media marketing, as well as our SaaS tools at HubSpot (CRM, Marketing, Analytics, etc.)
27. Virtual
28. Virtual training continues to increase.
29. Subscriptions continue to grow, but growth slows down

EMEA

1. Cloud, EDC and Axon
2. New products launched; Legislative change in UK (Brexit, Construction industry)
3. Certification.
4. No identifiable changes.
5. Self Paced Learning Labs
6. None. Only addition was subscription which is increasing. Same again for this quarter
7. Industrial applications; more advanced topics
8. Subscriptions - our new subscription eLearning offering continues to grow as Sales attach to more deals.
9. Technical courses
10. Self-paced, VILT, end-user enablement
11. SASE / Revisions to existing content
12. Learning Portal creation; Learning Subscriptions; Free e-Learning
13. Building in learning funds to larger sales which is great to see
14. Virtual classes
15. VILT
16. We continue to enjoy 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 Analytics, Storage, and Networking courses experienced the highest y/y growth in this most recent quarter for our EMEA countries
17. Certification rev picked up a bit more; Subscriptions up 20+% YoY
18. Subscriptions (but growth slowed down) public and private improved
19. Admin & Developer

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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. Live training and private sessions
3. Live classroom (in-person)
4. Instructor Led
5. Foundational developer training.

6. We've seen a dramatic decrease in classes pertaining to our backup & recovery features.
7. Firewall
8. Public schedule classes in a classroom
9. Public Classroom
10. None, growth is 25-30% in all segments at present.
11. Private ILT still offered to EDU but take up low due to travel restrictions.
12. Mainframe and older technologies
13. All
14. Have seen no call for a return to live classroom training
15. ILT is still at zero and on-demand continues to grow. There were no significant reductions across the portfolio
16. Hardware Installation
17. Basic operations
18. Two of our older proprietary technology areas - HP-UX and Non-Stop - showed the most decline in the past 6 months, in the case of HP-UX primarily due to this technology being at the end of its lifecycle, and in the case of Non-Stop because refreshed/updated courses are just now being introduced.
19. ILT
20. VMS Audio; Body-worn
21. We've seen a large drop-off in volume for classroom training. I think that the need for self-paced has gone up.
22. Limited in person training.
23. Still little in-classroom delivery.
24. Private Onsite Training went to zero with COVID; Public Classroom Training went to zero with COVID

EMEA

1. Public.
2. Public Classes - Classroom
3. Private classes
4. Games applications
5. VILT public classes have settled down from impact of Covid, Q3/4 last year saw high demand with new classes released and pent up demand, now business settled little lower to expected levels.
6. Finance Training
7. Face to face onsite/public - not happening until 2022.
8. Onsite (single organisation) classes
9. Ad hoc private requests
10. Live classes
11. Public ILT
12. VMware enrollments declined in our EMEA countries; almost every other training portfolio actually grew y/y in EMEA during our most recent quarter.
13. Online Learning and Video Classroom
14. no classroom training
15. Financial

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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. Converting International business to subscription offering; Private deliveries in Asia
3. 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.
4. Prove the value of training to overall company revenue and education services results.
5. 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.
6. Change of leadership; Pace of content development
7. Our greatest challenge was losing talent. Our senior instructional designer and trainer has been on medical leave for 9 months, our senior video production specialist moved to another team within the company 4 months ago and our director of knowledge experience retired 3 months ago. We're slowly rebuilding the team, but we lost all of our most experienced team members. The second challenge is related to the first, in that we're struggling to keep up with our workload, since our team is now so small.
8. Introduction of Training Credits program; COVID forcing us to a 100% virtual (live-online) schedule.
9. Lack of travel for instructors; Customers wanting in person vs. VILT
10. No Services Sales team. Reliant on Licence Sales team.
11. 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.
12. No dedicated Education Sales representatives; No regional Training Managers
13. Encouraging product sales to attach new learning subscriptions to deals. Q2/3 still converting a couple of remaining ILT classes to VILT, due to launch late Q3 & Q4.
14. 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.
15. 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.
16. Postponement of classes due to COVID. Hybrid Classes are now picking up
17. Adoption and utilization of previously purchased subscriptions.
18. Strategic sales alignment within our wider org and trying to launch new offerings under Covid seems to be more difficult
19. Lack of resources; Transformation of the company direction
20. Driving the sale of learning subscriptions
21. Headcount and headcount
22. Revenue doughnut hole during the transition to subscription. Providing awesome customer support to learning subscription users.

23. Convincing our internal sales teams that selling training benefits them, in terms of higher future product/support sales, as well as their clients. 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 strongly..
24. Bringing new people up to speed and employee turnover; Increased customer demand due to new customers being signed
25. In person Training; Travel
26. Lack demand for training
27. 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.
28. Customers' ability to travel.
29. Training credit redemption. Resolving messaging between offerings.
30. Free training requests; limited resources to develop new contents and deliver globally

EMEA

1. Getting our attendance rates up for public courses; COVID is still making business less predictable
2. Driving consumption of learning as it is free in my part of the business so the focus becomes effective awareness across a mature customer base. Early tests of promoting learning in the products we sell have proven positive - moving the learning closer the user in the moment of need is where we will focus. Measuring the impact of learning engagements in business terms (now the curriculum is free). Tying up the impact of learning on Customer retention, spend, contact rates to service etc are the goal and remain a work in progress.
3. Content development; Certification program changeover.
4. Achieving volume/revenue targets; Managing and reporting on our training partners
5. Delegates waiting for face to face classes to resume.
6. Instructor mental well being
7. Resourcing of trainers as we are a small niche product/market area
8. Keeping morale up and continuing all remote training
9. matching customer desire for advanced topics; Larger projects delayed
10. Educating and encouraging product sales to attach our new e-learning subscriptions to deals.
11. Customers wanting to split courses into half days over long period of time (e.g. 5 day course over 10 days) - Hits utilisation and ties up trainer; Reluctance for face to face
12. Pandemic and maintaining ATP relationships (since we pulled most deliveries back to our own org) during lockdown
13. CMS/LMS integration with ATP's; Ongoing
14. Motivating customers to move back from free to fee given the rise in free material available from other Departments and available online. Promotion of Certification and Badging. Customers gain Certifications and course badges but don't appear to want to publicise them.
15. Less smaller sales from the sales team
16. Overall decrease of ILT
17. No dedicated education sales team; Low education sales attach rate
18. Continued sharp business decline in our central European "Geo", due to local internal organizational issues and a retrenching of services sales teams. We are experiencing a decline in the Scandinavian countries as well, due to sales "lack of focus" issues.

19. Large reselling partners (GK, QA etc) have completely lost focus since COVID-19 started, in last 2 quarters it got a bit better, but not where it was a 1.5 years ago. Make corporate sales and the consulting organization automatically attach training to product deals or Consulting projects.
20. Free training offers or expectations for these; Resourcing limits in development and delivery
21. Continues to be a volatile unpredictable climate and uncertainty as to when is best to restart in-class training

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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. Customer requesting more virtual offerings or blended approaches; Digitalization and gamification becomes a main part of the learning methods
3. 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.
4. Customers more accepting of learning remotely, VILT, rather than travelling. Revenue returning to near 2019 levels.
5. We are a newer education services organization since Mar 2019 of our first paid delivery and our official Academy launch in April 2021.
6. 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.
7. The trend of free conference tickets is changing expectations for discounts and free passes
8. Still fantastic growth opportunities for companies who are adapting well to the digital transformation market demands, like we are. This is impacting training, as there is so much new content in demand. Trouble is keeping up with the demand and producing quality learning materials
9. An unexpected return of public training demand, which accounted for more than 10% of revenues during this past reporting period -- up from nearly zero in previous several reports.
10. Spend by customers is returning. Virtual training is becoming more acceptable in EMEA and APJ
11. Our financials have rebounded strongly from the 2020 pandemic year, with solid growth across all our key financial measures- orders, revenue, and margin. We are hopeful that this growth will continue into 2022.
12. Despite the pandemic it is still healthy
13. Delineation between Webinars and Virtual Training in this market
14. Still slow due to Covid19

15. Overall, opportunities are increasing, and business is close to pre-pandemic levels. Online training continues to flourish.

EMEA

1. Platform integration is becoming increasingly an area of focus. Improving consumption rates depends on a slick journey. Tracking consumption can create a barrier to a slick journey. I'm interested in proving the impact of learning while simplifying the journey and even moving away from LMS which creates friction.
2. Instructor travel is back for a very restricted number of cases.
3. Training revenues are still seeing a 10% drop in virtual classes, but ATPs have seen a 5% increase
4. innovation is outpacing content development right now. We seem to be producing a lot of free digital content to keep up with the pace.
5. Considering hybrid training as travel restrictions ease in some locations. CVMS and LMS integration with ATP's continues to be a challenge. Appetite for training (virtual) remains high. We have had success with VOD (video-on-demand) modality, particularly for large employee groups. Blended learning is becoming prevalent.
6. Some customers still waiting for classrooms to re-open in some countries. Some IT Departments and Facilities Teams looking to close down our Classrooms.
7. Customer booking later and later which can cause admin issues
8. We experienced (yet again) a very solid quarter; we are hopeful that this positive trend will continue into at least the next calendar year
9. My sense we will not return to the level of in-class training pre-covid. We are more likely to evolve to a hybrid model

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