CEdMA Worldwide Training Market Barometer
4th 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 27 inputs for world-wide (five of which were North America only) and 21 for EMEA.

Contents

Member Profiles

Sample size for 21q4 was 27 for Worldwide and 21 for EMEA.

Worldwide

Company's Business

Value	Category
7	Hardware
20	Software
26	SaaS

Company Revenue

Category	Value
$100M or less	2
$101M-$500M	8
$501M-$1B	3
$1-$3B	6
$3B-$10B	5
$10B-$25B	0
More than $25B	3

Company Headcount

Category	Value
100 or less	1
101-1000	3
1001-5000	9
5001-10000	8
10001-50000	3
50000+	3

Education Business Model

Value	Category
13	Profit Center
7	Cost Recovery
2	Cost Center
5	Hybrid

EMEA

Company's Business

Value	Category
5	Hardware
16	Software
19	SaaS

Company Revenue

Category	Value
$100M or less	1
$101M-$500M	3
$501M-$1B	2
$1-$3B	5
$3B-$10B	6
$10B-$25B	1
More than $25B	3

Company Headcount

Category	Value
100 or less	0
101-1000	3
1001-5000	3
5001-10000	5
10001-50000	7
50000+	3

Education Business Model

Value	Category
15	Profit Center
3	Cost Recovery
2	Cost Center
1	Hybrid

Education Headcount (left pie chart): 10 or less: 8; 11-20: 4; 21-50: 6; 51-100: 3; More than 100: 6

Education Headcount (right pie chart): 10 or less: 9; 11-20: 3; 21-50: 2; 51-100: 5; More than 100: 2

Education Revenue (left bar chart): No revenue: 0; $500K or less: 5; $500K-$1M: 1; $1M-$3M: 7; $3M-$5M: 2; $5M-$10M: 3; $10M-$50M: 6; $50M-$100M: 2; $100M or more: 1

Education Revenue (right bar chart): No revenue: 0; $500K or less: 3; $500K-$1M: 1; $1M-$3M: 5; $3M-$5M: 3; $5M-$10M: 2; $10M-$50M: 5; $50M-$100M: 1; $100M or more: 0

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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 8% through 21q4.
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 6% through 21q4.

Operating Profit is revenue minus all fixed and variable costs, excluding allocations, divided by revenue.
WW: The growth trend is back up to 5% at 21q4. 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 +1-2% through 21q4.

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 +2% though 21q4.
EMEA: It fell to negative 7% during 2020 but is now flat through 21q4.

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 even with live training coming back slowly.
EMEA: The trend has risen steadily from 2% in 2017 to 8-9% through 21q4 with live training returning.

Public (scheduled) classes is revenue for ILT and VILT.
WW: The trend dropped to negative -10% in 2020 but is now showing negative -1% through 21q4.
EMEA: The trendline was negative -11% in 2020 but is now flat through 21q4.

Private (one-customer) classes is revenue for ILT and VILT.
WW: The trend dropped to negative -10% in 2020 but is now showing +4% through 21q4.
EMEA: The trend dropped to negative -9% in 2020 but is now showing +6%% through 21q4.

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 10% increase through 21q4, 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 21q4. 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 is at 9% 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 still 5% through 21q4 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 8-9% through 21q4.
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 21q4 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.

N**ew 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 4%.
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 increase has grown from 7% during 2017 to 9% during 2019 to now 10-11%.
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 9-10%.
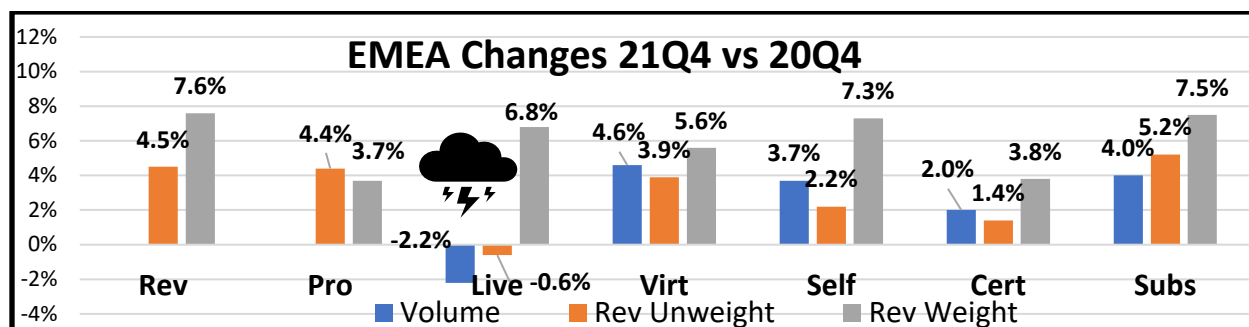**Back to top**

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 21q4.

WW	Rev	Prof	Live	Virtual	Self	Cert	Subs
Volume			-2.4%	4.6%	6.3%	3.8%	5.8%
Revenue Unweighted	6.7%	4.5%	-0.2%	4.2%	5.9%	3.2%	7.4%
Revenue Weighted	8.5%	5.1%	5.9%	7.1%	10.6%	5.6%	10.6%
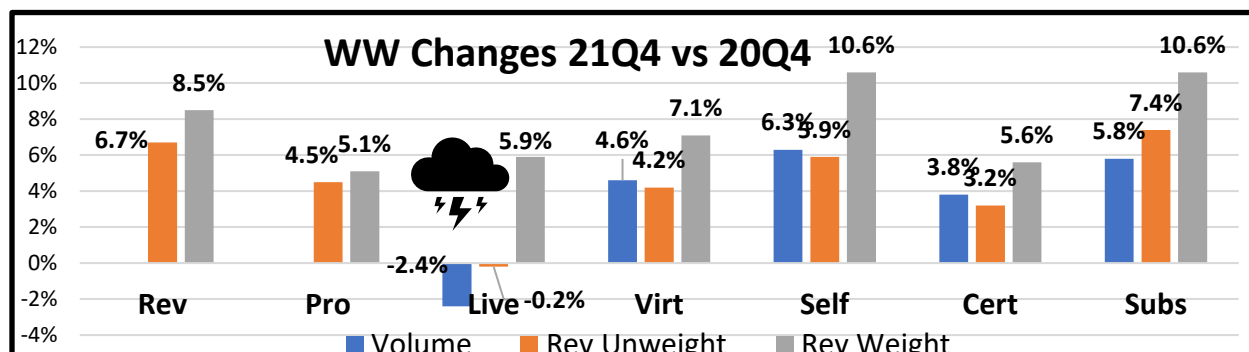
The significant revenue increases for 21q4 compared to 20q3 are overall revenue, virtual instructor-led, self-study, certification and subscriptions. Live instructor-led is coming back slowly, more quickly for larger companies.

| EMEA	Rev	Prof	Live	Virtual	Self	Cert	Subs
Volume			-2.2%	4.6%	3.7%	2.0%	4.0%
Revenue Unweighted	4.5%	4.4%	-0.6%	3.9%	2.2%	1.4%	5.2%
Revenue Weighted	7.6%	3.7%	6.8%	5.6%	7.3%	3.8%	7.5%

The significant revenue increases for 21q4 compared to 20q3 are overall revenue, live instructor-led, self-study and subscriptions. Live instructor-led is coming back mainly for larger companies.

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Overall Training Revenue
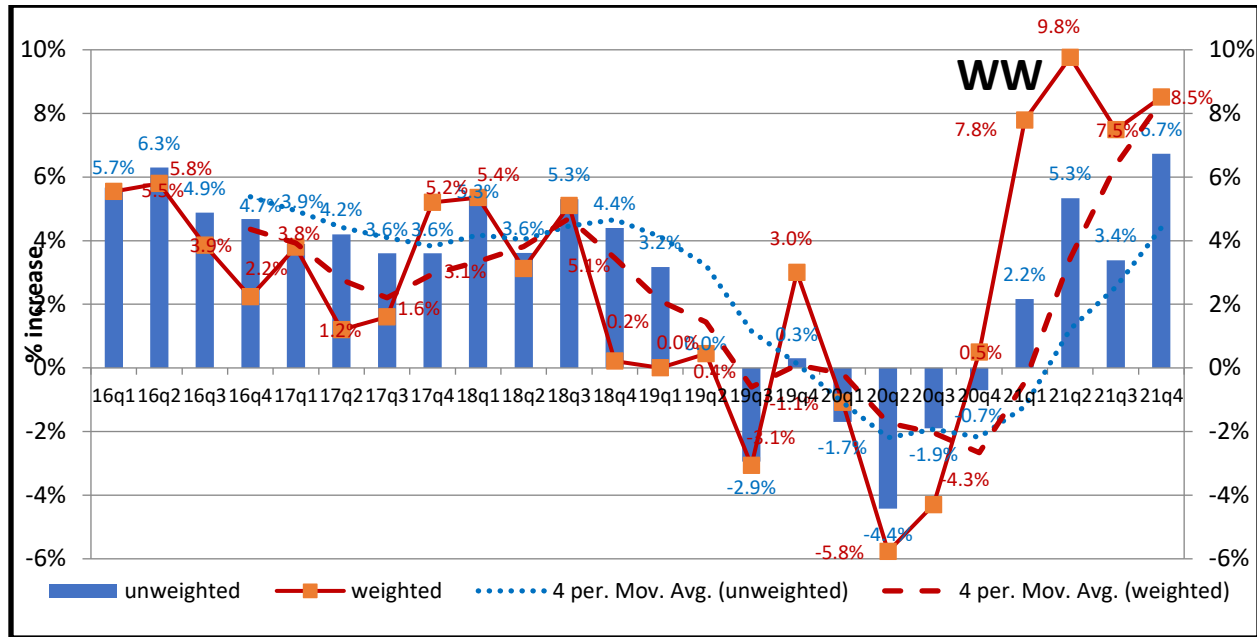
The unweighted total training **revenue** increase for 21q4 (u=20, f=4, d=2) was 6.7%. However, the weighted total training **revenue** increase was 8.5%. The 4-period moving average is currently showing positive 8% for weighted.
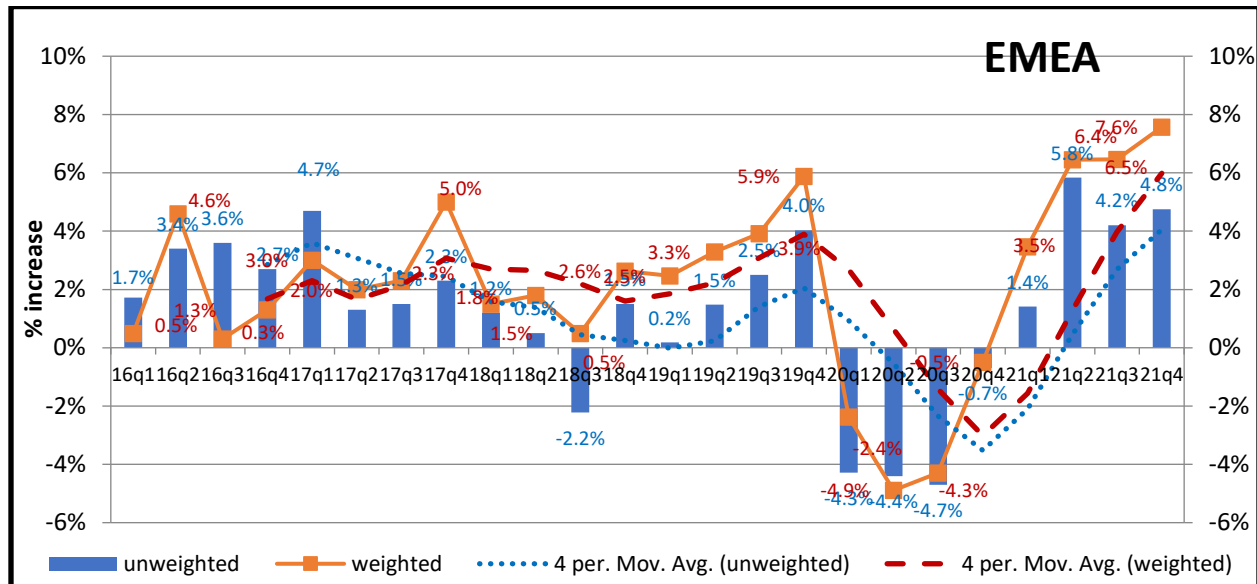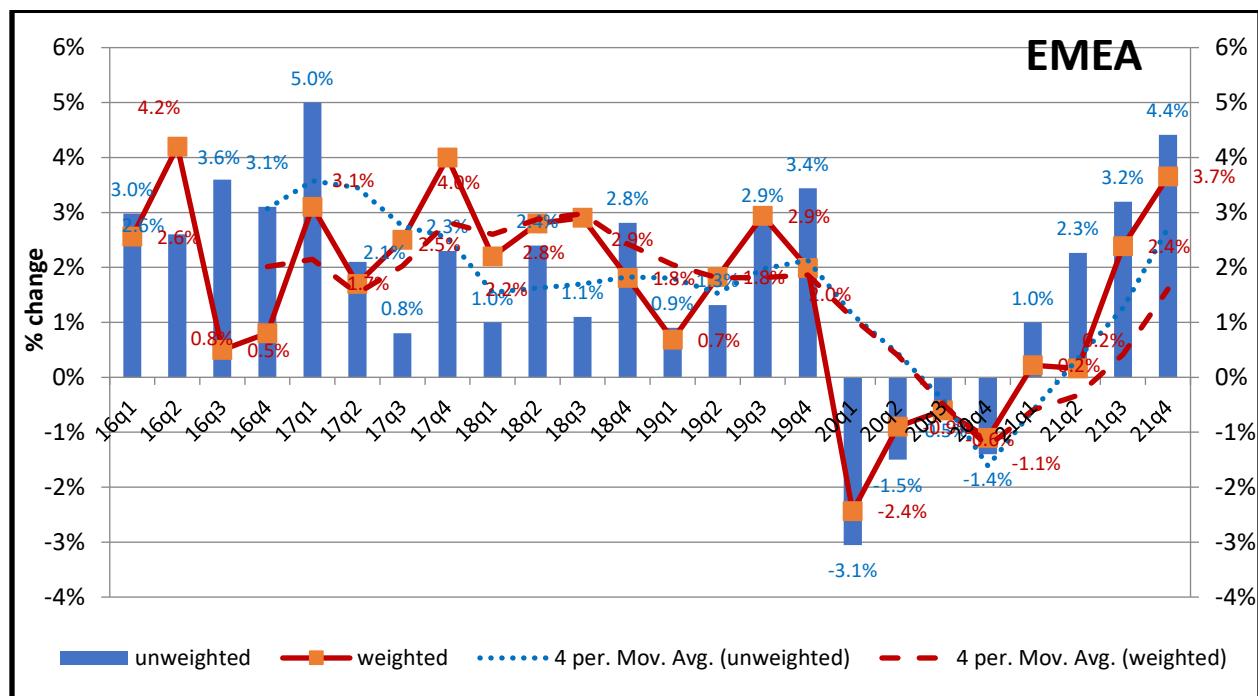

The unweighted total training **revenue** increase was 4.5% in 21q4 (u=13, f=4, d=3). When considering the weighted numbers, it was 7.6%. The weighted trendline shows a increase of 6% over the last four quarters when size of company is considered.

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Training Profit
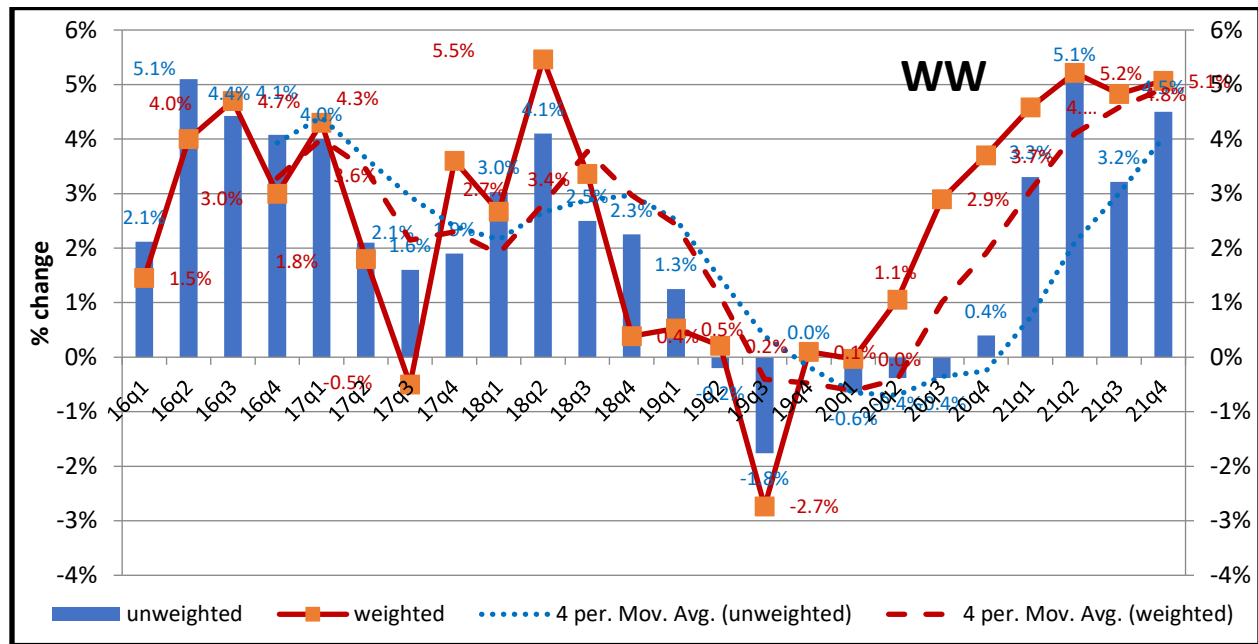
Training profit in 21q4 (u=15, f=8, d=2) increased 4.5% for unweighted and 5.1% for weighted. The training profit weighted trendline is now positive 5%.


The unweighted total training profit rose 4.4% in 21q4 (u=11, f=5, d=1). And, with the weighted numbers, there was also an increase of 3.7%. The weighted trendline shows 1-2% for the last four quarters when size of company is considered.

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Live Instructor-led Training
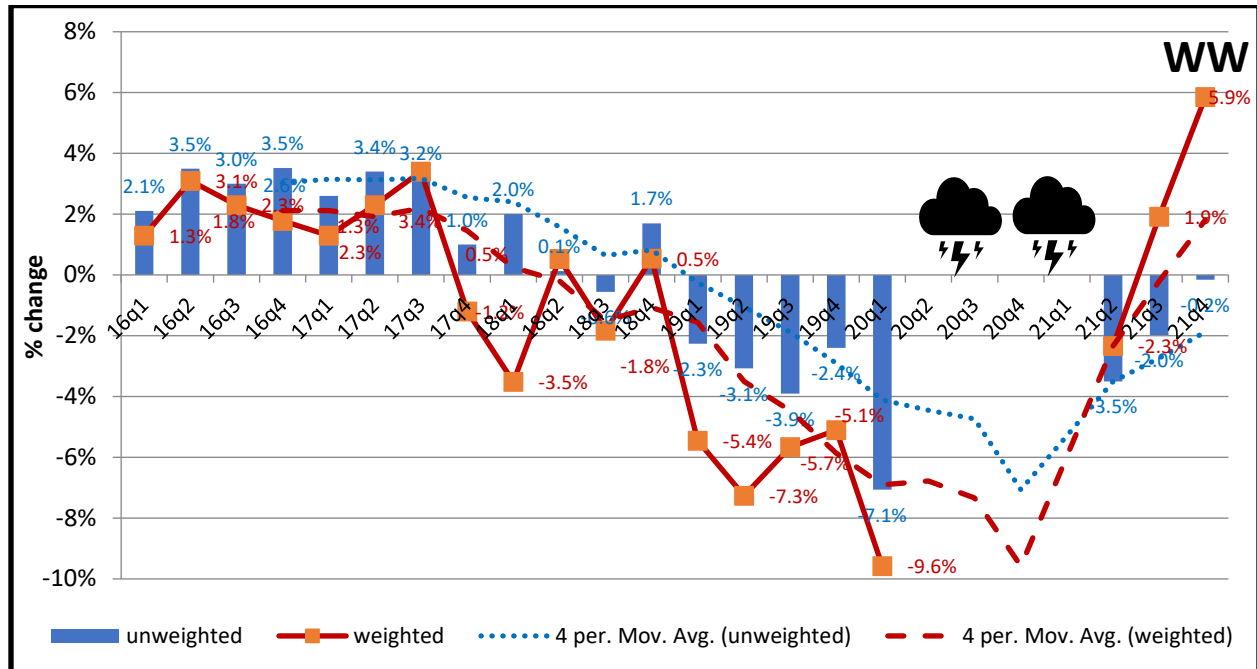
Live instructor-led training is back for 15 members (u=6, f=5, d=5) which leaves the unweighted change of negative -0.2% but positive 5.9% when weighted. The weighted moving average is positive 2%.
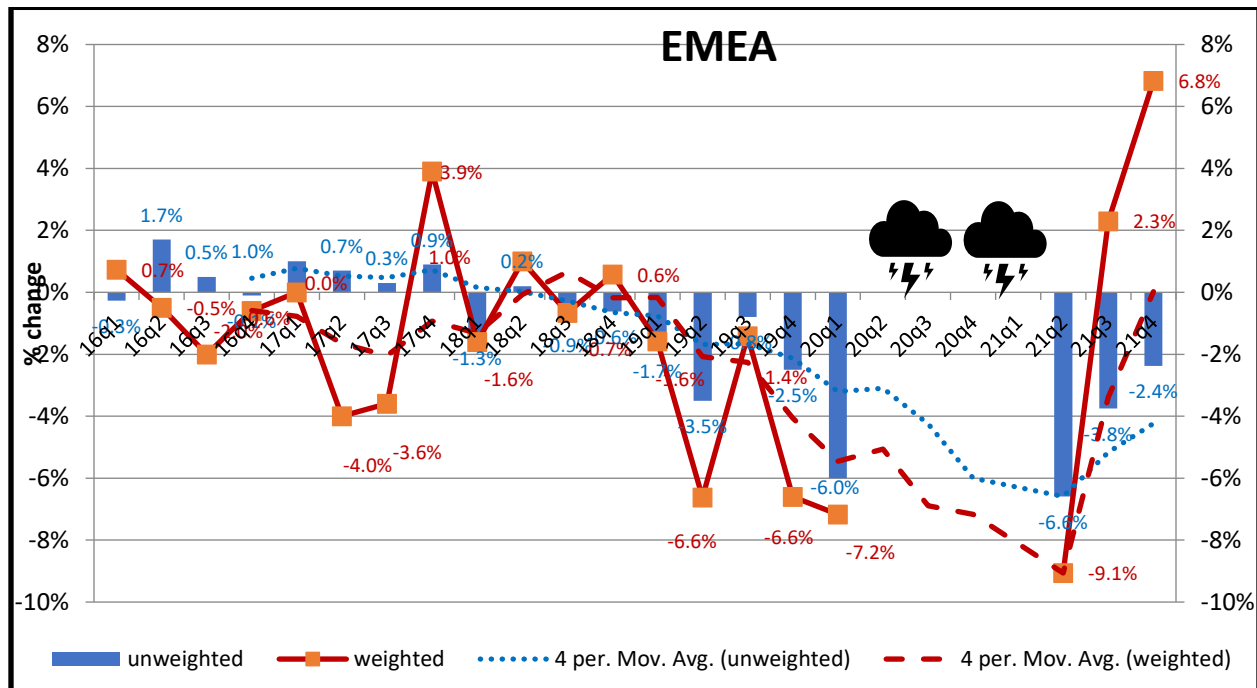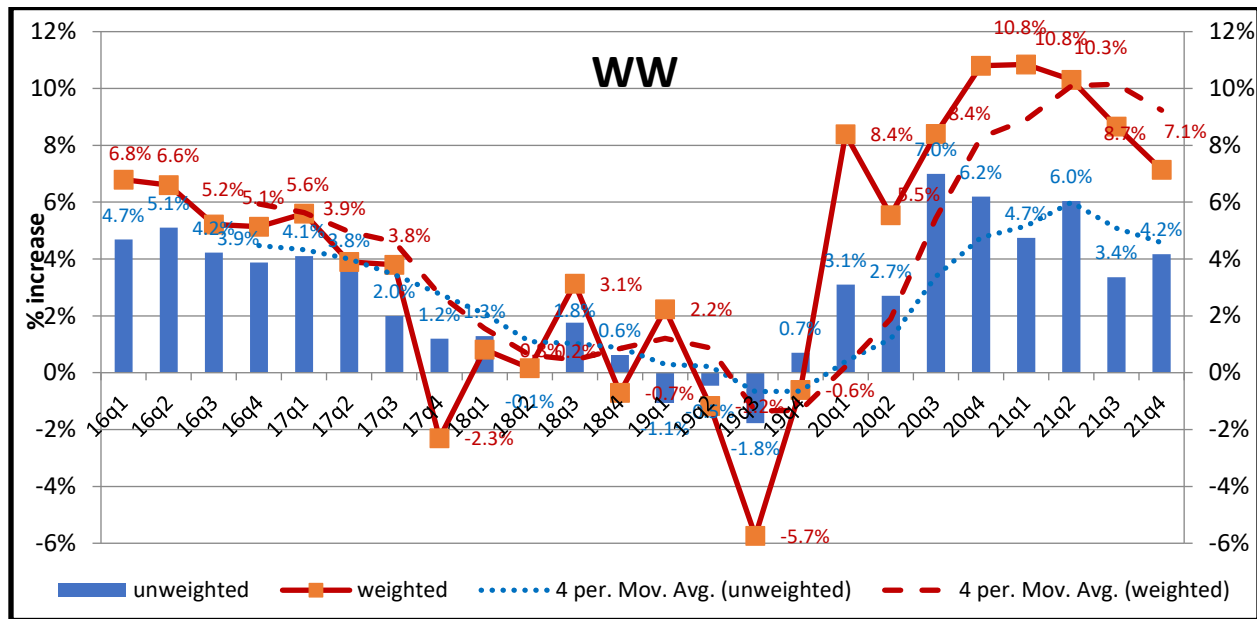

Live instructor-led training is back for 12 members (u=3, f=5, d=4) which leaves the unweighted change of negative -2.4% but a positive 6.8% when weighted. The weighted moving average is flat.
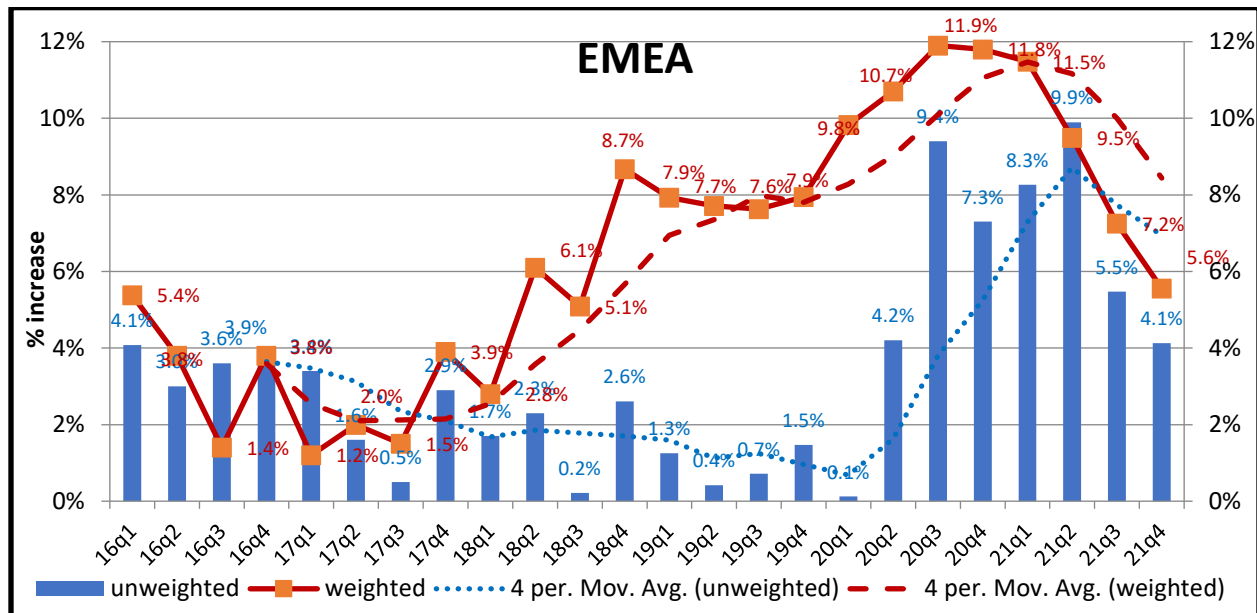
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Virtual Instructor-led Training

Virtual classroom has continued to thrive. The unweighted virtual classroom **revenue** increase for 21q4 (u=16, f=2, d=6) was 4.2%, with the weighted **revenue** increase at 7.1%. The increase in **volume** was 4.6%. 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, VILT remains high. The unweighted 21q4 **revenue** increase is 4.1% (u=14, f=3, d=3) and the weighted increase 5.6%. The increase in **volume** was 4.6%. The weighted trendline shows an ongoing VILT increase of 8-9% 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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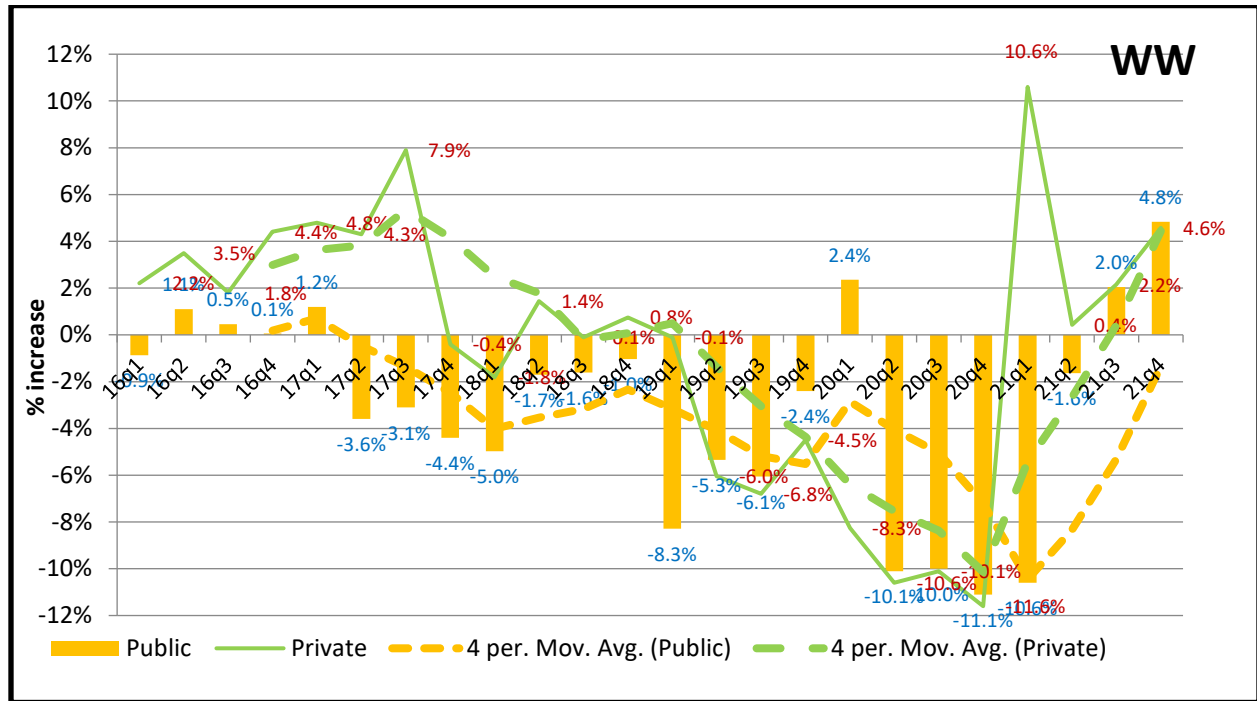
Public v Private Unweighted
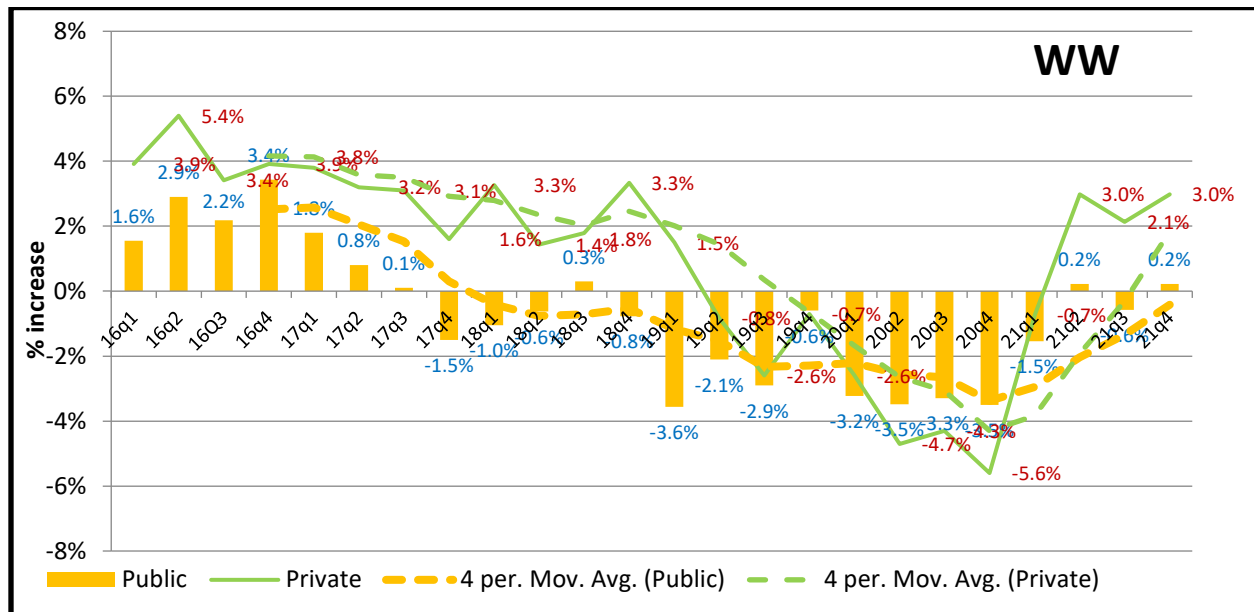
We include questions on public classes and private classes. Unweighted public **revenues** have increased in 21q4 by 0.2% and private increased by 3.0%. The increase in **volume** was 1.8% for public and 2.2% for private. The trendline is now negative -1% for public but positive 2% for private. (Note that public is u=9, f=7, d=7 and private u=13, f=7, d=6.)
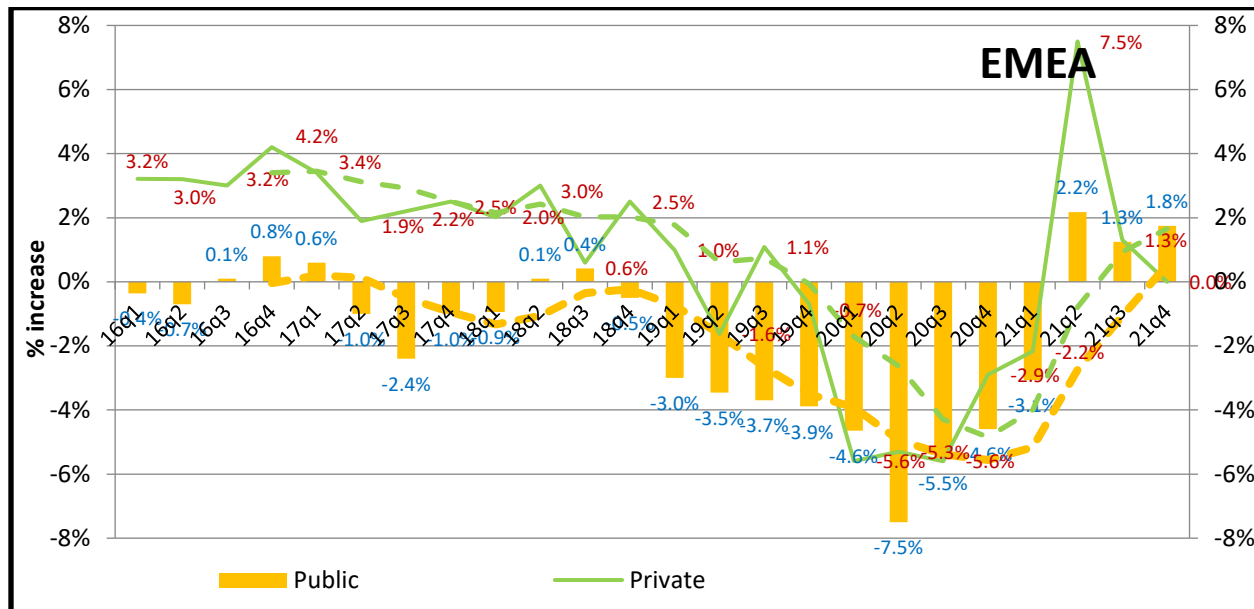

We are now asking you to forecast both public (u=9, f=6, d=4) and private (u=7, f=7, d=6) classes and have enough history to show that private classes show **revenue** is increasing 2% over the last four quarters, and public classes are flat. **Volumes** increased 2.1% for public and 2.5% for private. This shows unweighted values.

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Public v Private Weighted

When weighting is considered, the changes from 21q1 are also dramatic. In 21q4, public **revenue** has increased by 4.8% and private **revenue** increased by 4.6%. The 4-period moving average is negative -1% for public but positive 4% for private.
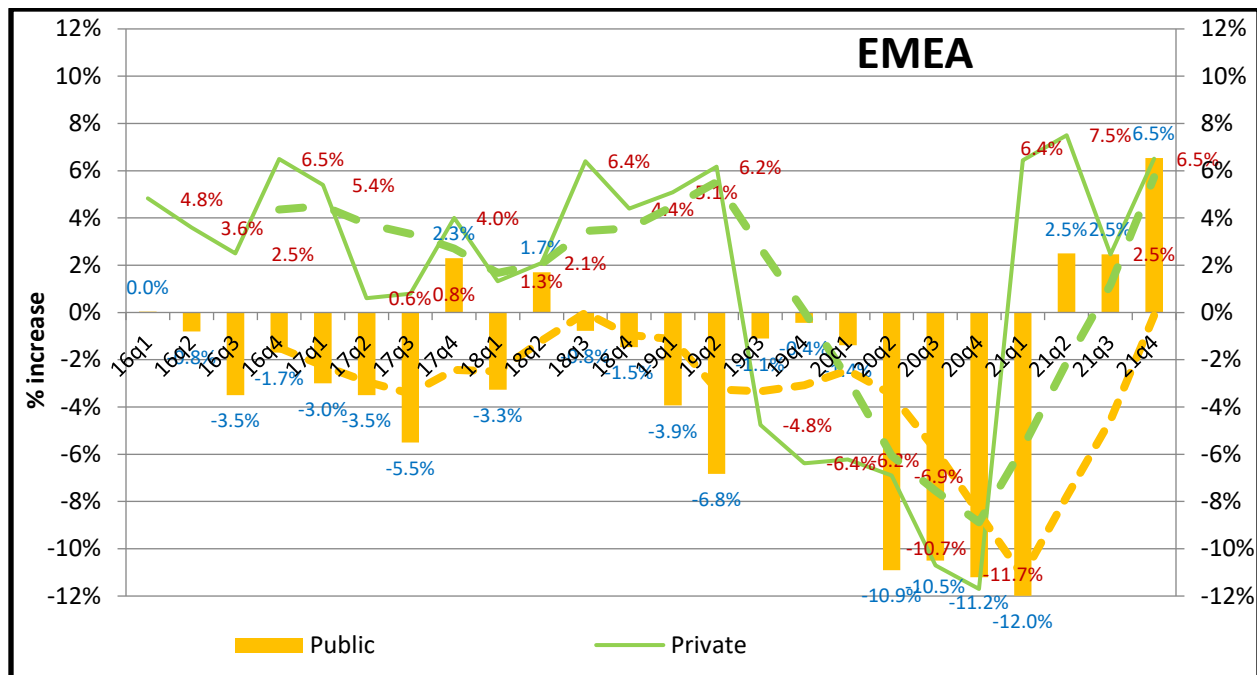
Weighted values have the **revenue** trendline for public showing flat, but private positive 6%.

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Self-Paced
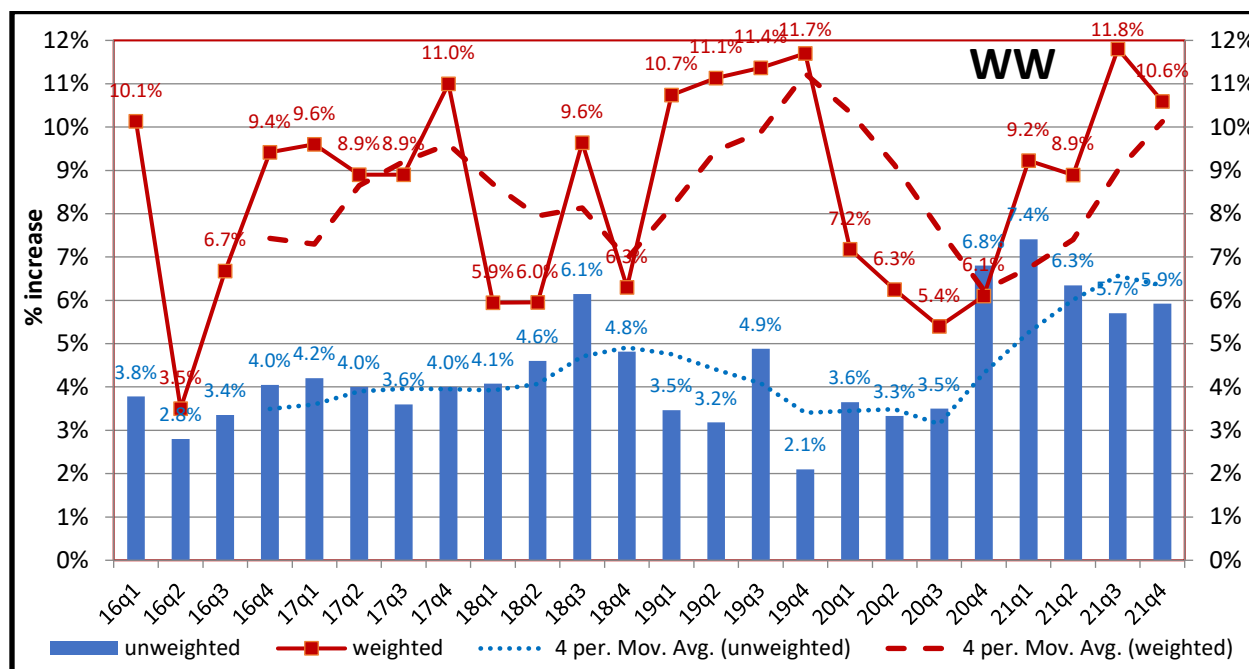
The unweighted self-paced **revenue** increase in 21q4 (u=13, f=4, d=2) was 5.9%. However, the weighted self-paced **revenue** increase was 10.6%. The increase in **volume** was 6.3%. The 4-period moving average shows 10% for weighted.
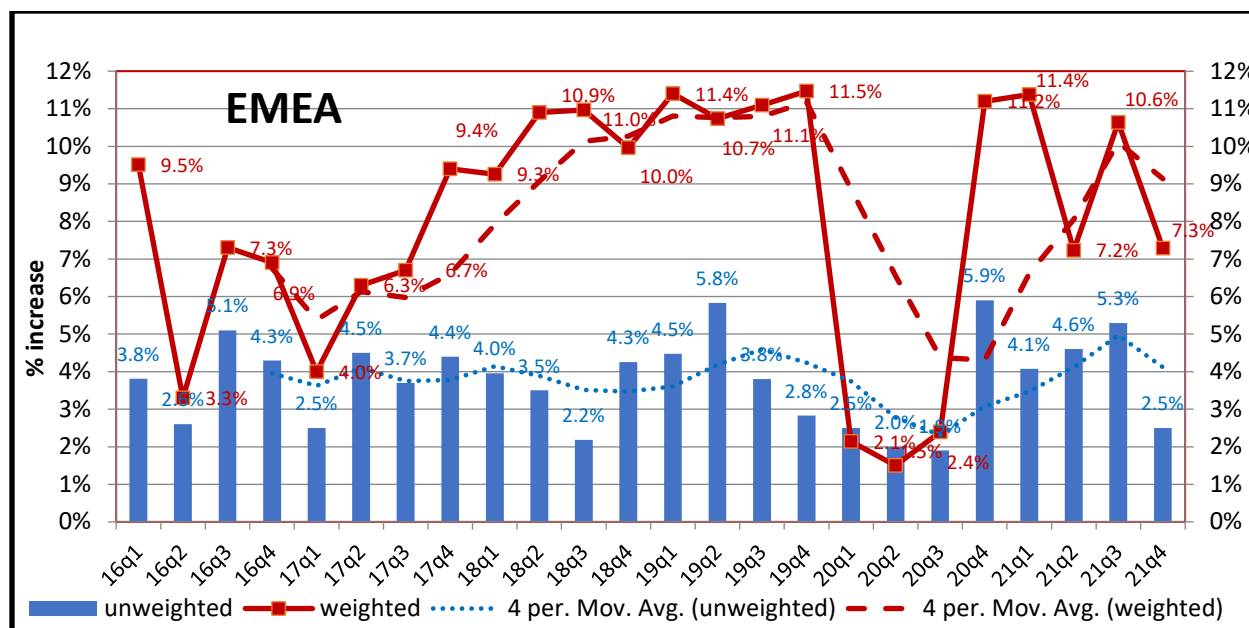
The results for 21q4 (u=8, f=4, d=4) were 2.5% increase unweighted and 7.3% increase weighted. The increase in **volume** was 3.7%. Larger companies still have a significant effect on these averages. The 4-period moving average is 9% increase for weighted, with companies back to charging for self-study.

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Certification
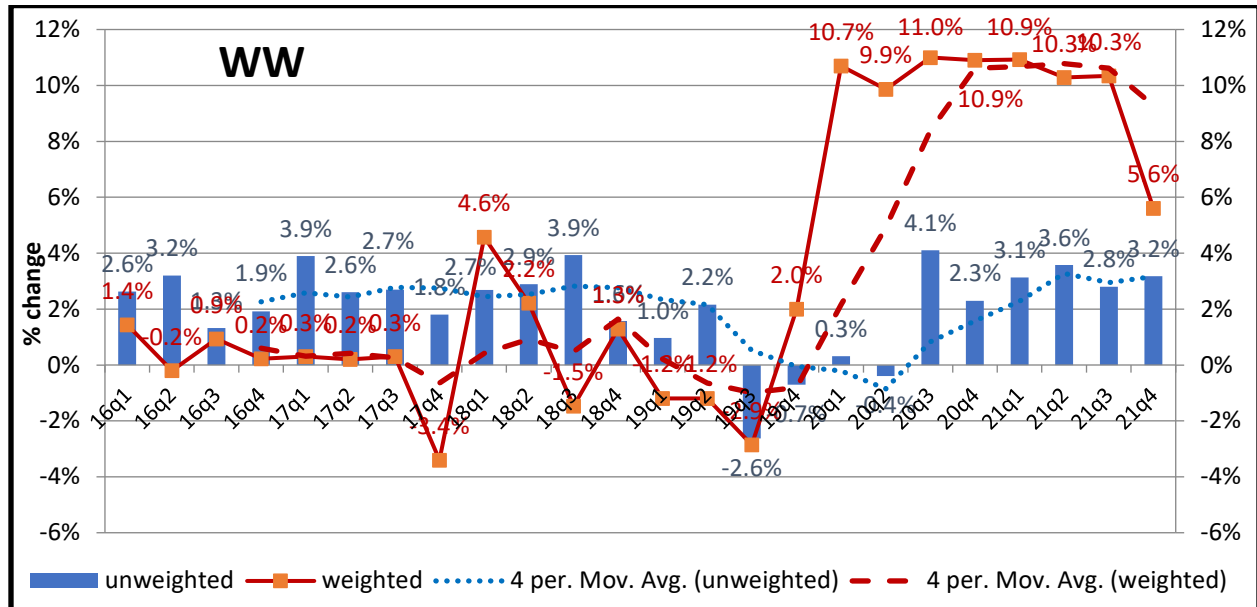
The unweighted certification **revenue** increase for 21q4 (u=14, f=4, d=4) was 3.2%, and the weighted certification **revenue** increase was 5.6%. **Volume** was an increase of 3.8%. The weighted 4-period moving average is 9%. Customers and partners may be taking advantage of the pandemic for re-skilling and certification exams.
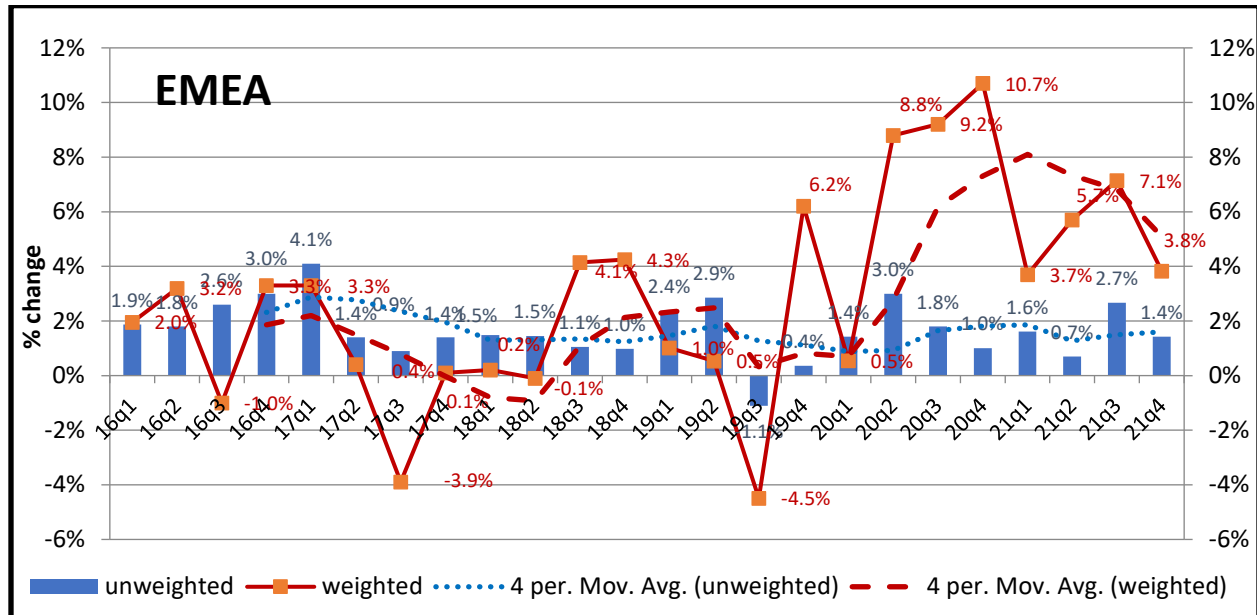
Certification has shown several swings over the last four years. However, the latest large increase has probably resulted from the push by partners and customers to certify more staff. The increase in **volume** was 2.0%. The **revenue** increases for 21q4 (u=6, f=6, d=2) are 1.4% for unweighted and 3.8% when weighted. The weighted 4-period moving average is 5%.

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Learning Consulting
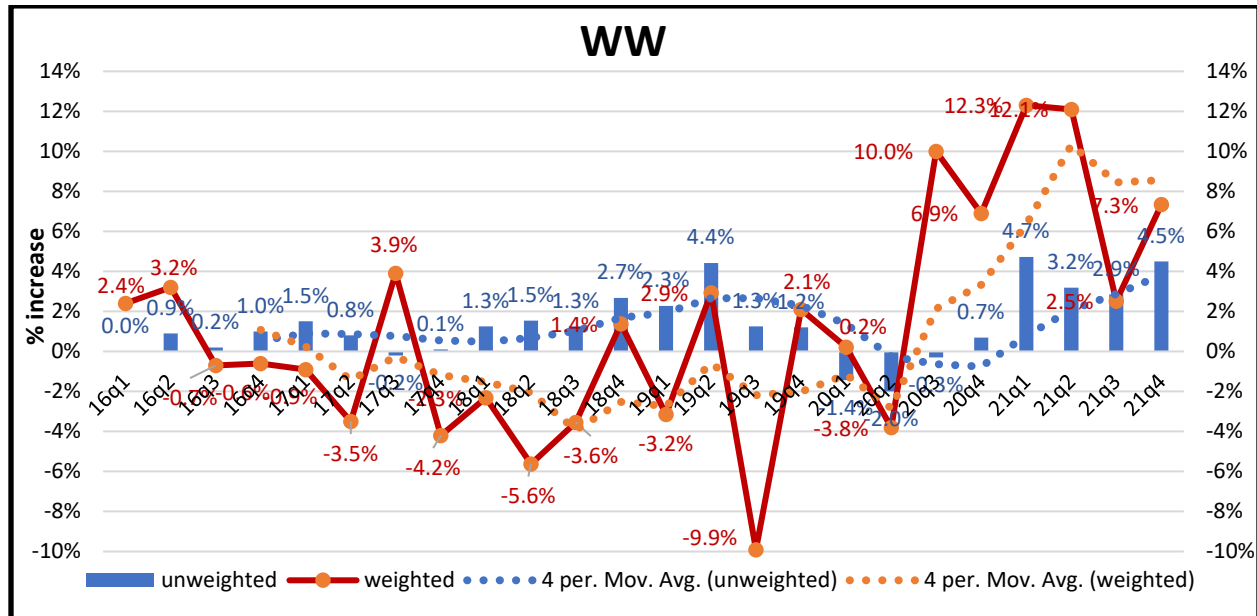
We now have six years reporting this area. Weighted scores have been volatile and show a moving average of positive 8-9%. The decrease in **volume** was negative -0.8%. The **revenue** changes for 21q4 (u=3, f=2, d=0) are 4.5% for unweighted and 7.3% when weighted.
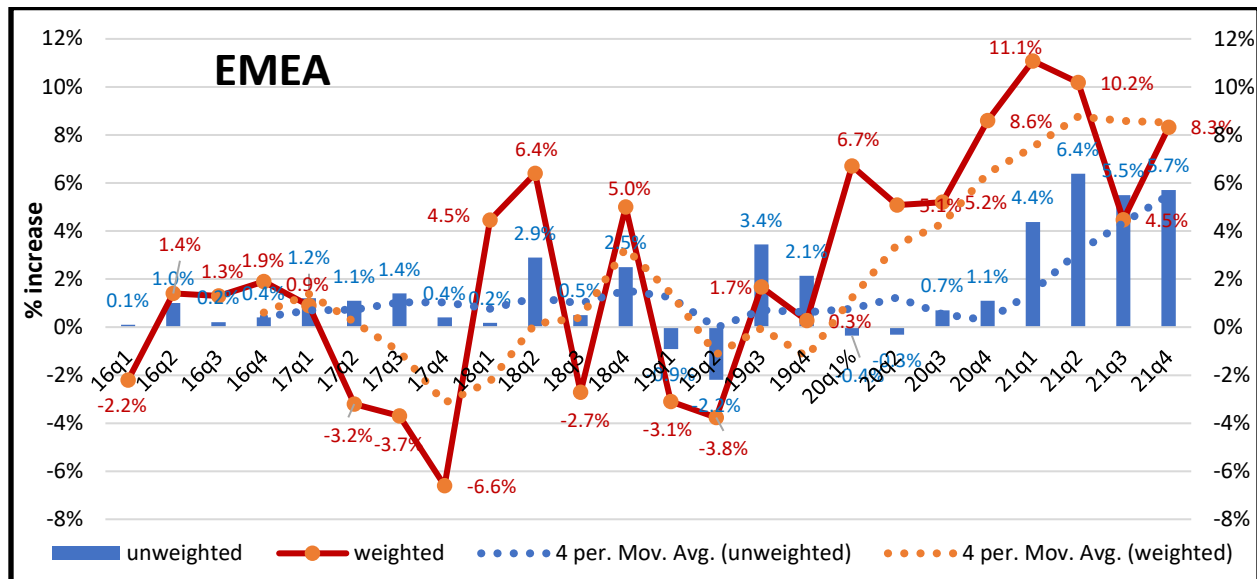
We now have six years reporting this area. In that period, the unweighted scores have recently increased. However, weighted scores have moved dramatically. The **revenue** increase for 21q4 (u=4, f=3, d=0) is 5.7% for unweighted but 8.3% when weighted. **Volume** increased 2.8%. The current four-period average for weighted is 8% increase.

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Learning Technologies
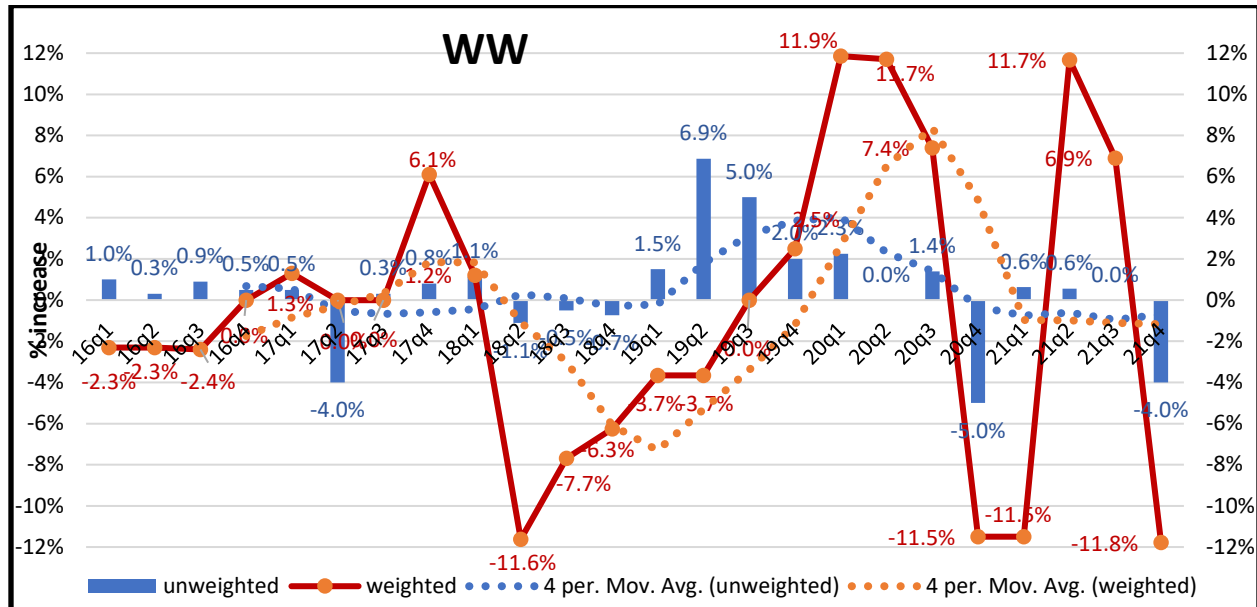
We also now have six years reporting this area. The trendline for weighted scores has dropped to just below flat, maybe caused by no onsite work allowed. The **revenue** decrease for 21q4 (u=2, f=1, d=2) was -4.0 for unweighted and -11.8% when weighted.
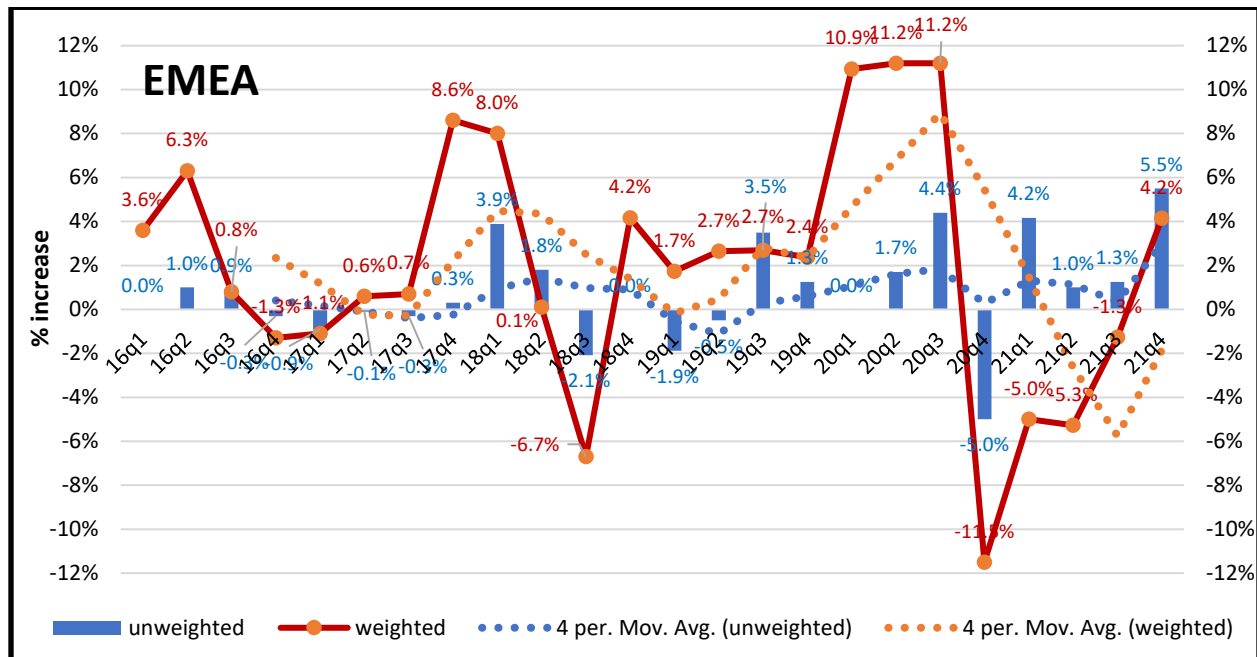
We also now six years reporting this area. In that period, the unweighted scores have recently shown a little volatility. The **revenue** increase was 5.5% for 21q4 (u=3, f=2, d=0) for unweighted and 4.2% when weighted. The trendline for weighted is now negative -2%.

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New Learning Modalities
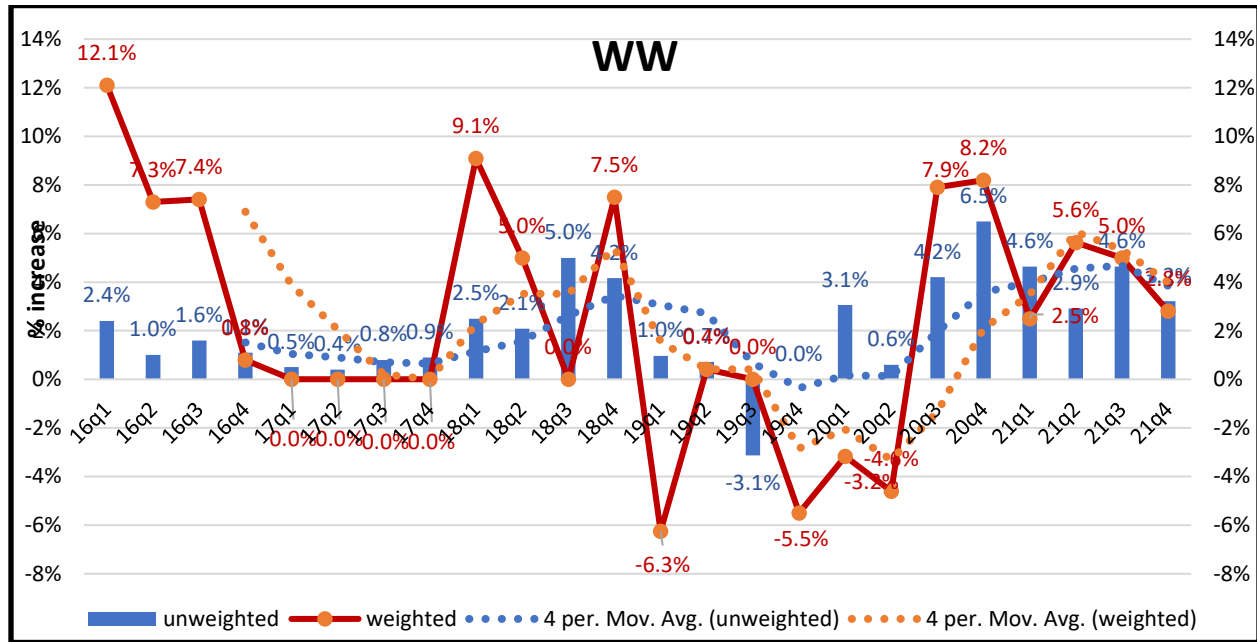
We now have 24 quarterly reports. In the last 12 months, the trendline for weighted scores is positive 4%. The increase in **volume** was 0.5%. The **revenue** increase for 21q4 (u=3, f=4, d=0) is 3.2% for unweighted and 2.8% for weighted.
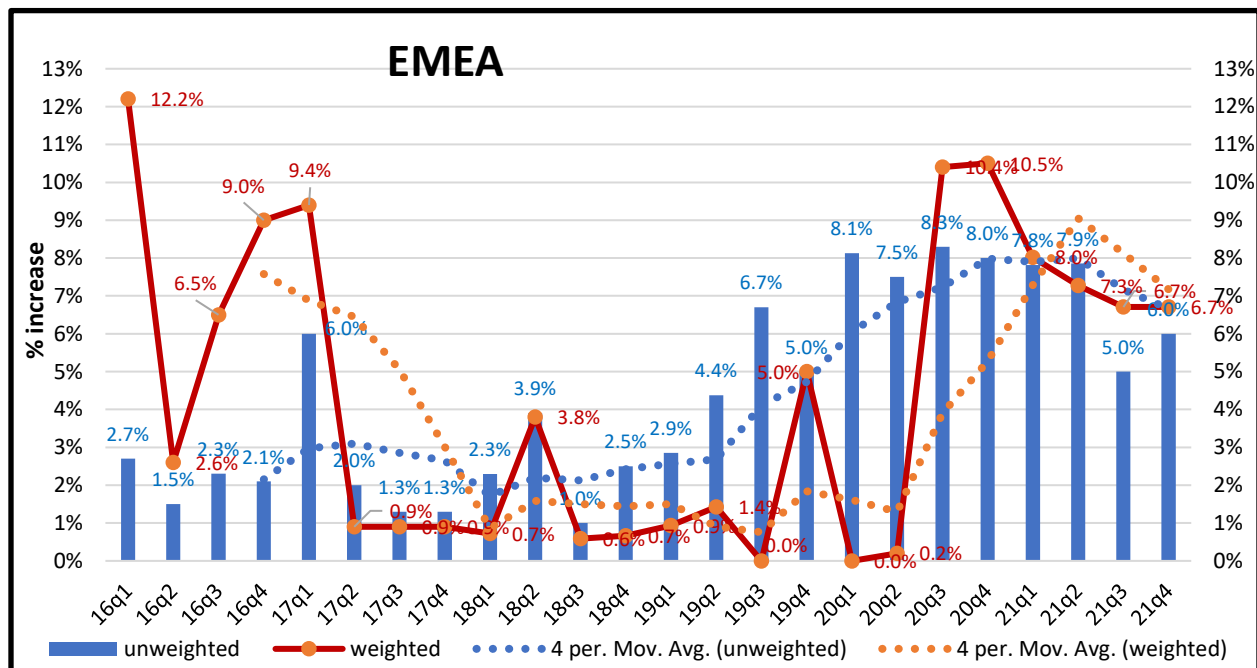
The unweighted trendline is 7%, while the weighted trendline sis also 7%. The **revenue** increase for 21q4 (u=4, f=1, d=0) is 6.0% for unweighted and 6.7% for weighted. The increase in **volume** was 3.0%.

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Subscriptions
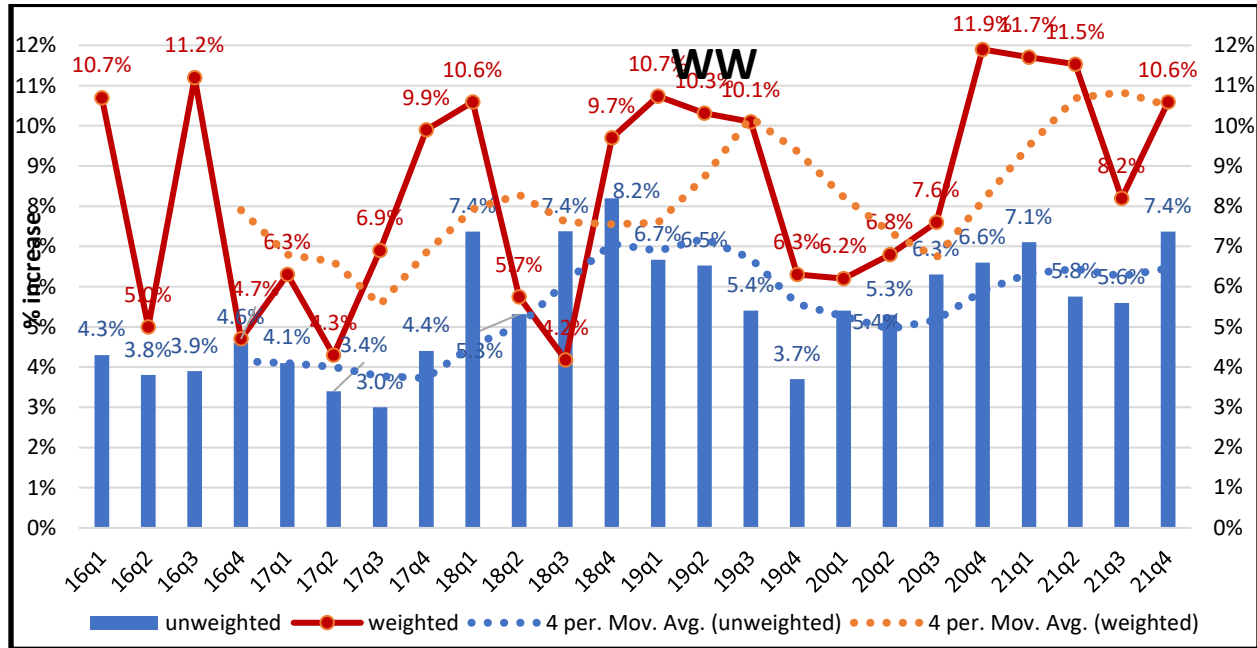
We also have 24 quarterly reports here. Currently, the weighted trendline is 10-11%. The **revenue** increases for 21q4 (u=16, f=3, d=0) are 7.4% for unweighted and 10.6% for weighted. The increase in **volume** was 5.8%.

The unweighted trendline is 8%, with the weighted trendline 9-10%. The **revenue** increases for 21q4 (u=10, f=2, d=1) are 5.2% for unweighted and 7.5% when weighted. The increase in **volume** was 4.0%.
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Which subject areas saw the biggest increases in your training revenues in the last 3-6 months?

Worldwide

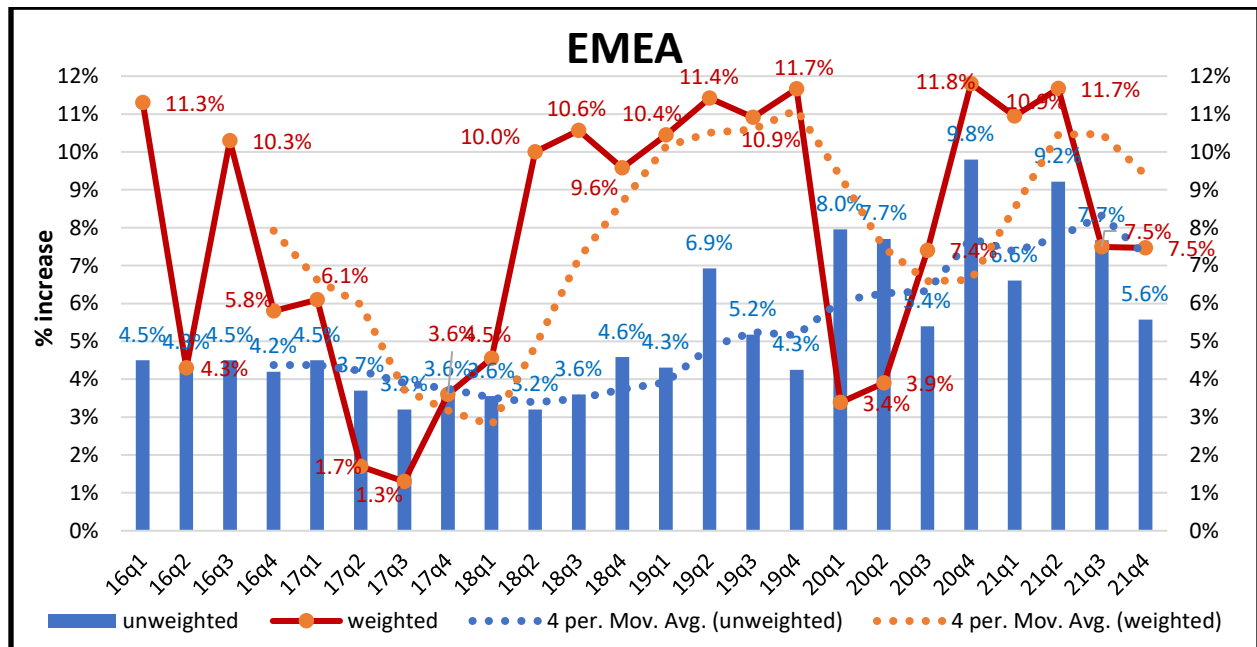|	
1.	We launched 5 new certifications in the last 6 months. We had a record high of training sales last quarter. We are new learning organization and had little revenue last year, so we have seen tremendous growth.
2.	Certification exam deliveries and private classes
3.	Free partner training
4.	Virtual training continues to increase.
5.	Partner specialisation
6.	Uptake virtual private ILT
7.	Subscriptions
8.	Growth in our new e-learning subscription offering (self-paced). Learning Partner business is recovering, with Certifications returning to almost pre-Covid levels.
9.	Continued growth of Cloud-based products.
10.	Our Linux, Microsoft and Data Center Management training portfolios achieved the greatest y/y growth in the past 6 months. Growth for these portfolios vary from 12 to 39% y/y
11.	Product Training
12.	Self-Paced
13.	Installation/provisioning topics, operations, advanced technical topics, best practices
14.	Learn Online offering that runs as virtual bus schedule sessions. Self-Paced, embedded into Software
15.	Self-paced learning, online learning and hands-on labs.
16.	Subscriptions
17.	We are seeing a lot of demand for services specific content and training. As our IB grows, more users want different levels of training and credentialing.
18.	Administrator Training (based on a new platform). OnDemand training.
19.	Self-directed Learning and Certification exams
20.	Subscriptions continue to grow, but growth slows down
21.	Our subscription revenue (new and renewals) continues to grow. Subscription contains self-paced, eLearning and low stakes certification.
22.	We only provide product training, so we don't have subject areas.
23.	Subscriptions
24.	Subscriptions, certification prep classes

EMEA

1.	Private event live virtual classes
2.	Learning Portal creation; Learning Subscriptions; Free e-Learning
3.	None. Only addition was subscription which is increasing. Same again for this quarter
4.	VILT
5.	Advanced VMware, Linux.
6.	Skill badges, self-paced labs and on-demand
7.	Admin and Developer

8.	We continue to enjoy strong y/y growth in Support Contract "attach" sales. Our VMware, Cloud and Linux courses experienced the highest y/y growth in this most recent quarter for our EMEA countries
9.	Subscriptions
10.	Self-Paced Learning Labs
11.	Self-paced, VILT, end-user enablement
12.	Technical courses
13.	One to many product learning (webinar mainly) has grown the most. This is mostly existing customers topping up knowledge and expertise on core functionality.
14.	ILT, we are back on the road (in very specific cases).
15.	SASE/Revisions to existing content
16.	Subscriptions (but growth slowed down); public and private improved
17.	No identifiable changes.
18.	Scheduled courses have increased significantly which is great to see
19.	VILT picked up in Autumn nicely again; Subscriptions up 10+% YoY

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

Worldwide

1.	Have still seen no significant call for a return to live classroom training
2.	On-site training was still pretty flat (1 delivery in Q4). Still mostly virtual delivery (>98%)
3.	Paid-for customer training
4.	Still little in-classroom delivery.
5.	ILT is still at zero and on-demand continues to grow. There were no significant reductions across the portfolio
6.	Instructor Led
7.	Firewall training
8.	Two of our older proprietary technology areas - HPUX and NonStop - continued their decline in the past 6 months, in the case of HPUX primarily due to this technology being at the end of its lifecycle, and in the case of NonStop because refreshed/updated courses are just now being introduced.
9.	Any instructor-led course delivery
10.	Public Classroom
11.	Basic operations
12.	Live training and private sessions
13.	Live classroom (in-person)
14.	None, growth is 25-30% in all segments at present.
15.	We've seen a large drop-off in volume for classroom training. I think that the need for self-paced has gone up.
16.	Foundational developer training.

17.	Private Onsite Training went to zero with COVID; Public Classroom Training went to zero with COVID
18.	We only provide product training so we don't have subject areas.
19.	Limited in-person training.
20.	ILT

EMEA

1.	Onsite (single organisation) classes
2.	Private classes, however, these are increasing now F2F is coming back
3.	Public ILT
4.	High-end storage
5.	Dedicated onsite training including certification journey programmes
6.	VILT in Q4 back to usual volumes, but seen as a big decrease compared to Q4,2020 where we had released some new courses and there was also pent-up demand from cancelling ILT classes in Q2/3 due to Covid.
7.	Storage and Compute-related enrollments declined y/y most significantly in our EMEA countries
8.	Live classes
9.	Public Classes - Classroom
10.	Face to face onsite/public - not happening until 2022.
11.	Finance Training
12.	No major legislative change in the last 3 months so we have seen a decrease in this area.
13.	No face-to-face classroom training
14.	No identifiable changes.
15.	Ad hoc private requests
16.	Online Learning and Video Classroom (Web based)

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

Worldwide

1.	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.
2.	Adoption and utilization of previously purchased subscriptions.
3.	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
4.	Push to move to subscription model
5.	Training credit redemption. Resolving messaging between offerings.
6.	Huge team expansion, frequent product release cycles
7.	Strategic sales alignment within our wider org. The move to the single services sales team has created the usual challenges.
8.	Lack demand on training - we are still not back to before-Covid amount

9.	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.
10.	Encouraging sales to attach new learning subscriptions to product sales. Development resources stretched - keeping structured courses up to date, including books/eBooks, in parallel creating online interactive eLearning versions and supporting new company initiatives around learning content needed for customer onboarding journeys.
11.	Maturation of Training Credits program; Growth of Training Credits backlog
12.	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 is near our target at present, which represents strong growth.
13.	Transforming from a traditional business to a more modern, learner centric business.2. Business change but comp plans and motivational drivers did not. This has sent mixed messages internally.
14.	No Services Sales team. Reliant on Licence Sales team.
15.	Headcount -- headcount
16.	Converting International business to subscription offering; Private deliveries in Asia
17.	Prove the value of training to overall company revenue and education services results.
18.	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.
19.	Creating a training and credentialing program that is complex but not complicated. Aligning stakeholders around one cross-functional vision.
20.	Change of leadership and associated direction; Pace of content development.
21.	Incorporating formal training into the user adoption process; Driving the sale of learning subscriptions
22.	Free training requests; limited resources to develop new contents and deliver globally
23.	Staying on top of our monthly parent product release and related new features.
24.	Difficult in getting data. Unwillingness by executives to invest in on-premise products.
25.	Customers' ability to travel.
26.	Bringing new people up to speed and employee turnover; Increased customer demand due to new customers being signed

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1.	Push to move to subscription model
2.	Motivating customers to move back from free to fee given the rise in free material available from other Departments and what they can find through other online resources. Timeliness of paperwork completion. Despite use of systems like Docusign the continuing lack of people on offices slows down getting paperwork completed, purchase orders received, invoices out etc.
3.	Keeping morale up and continuing all remote training
4.	Resourcing of trainers as we are a small niche product/market area
5.	No dedicated education sales team; Low education sales attach rate
6.	Travel requirements for onsite training.
7.	Covid-19: pivoting to 100% virtual and online proctored certification
8.	Whether to return to in-class training as customer demand grows; The legal process of onboarding new partners
9.	Educating and encouraging product sales to attach our new e-learning subscriptions to deals.

10.	Our Channel Sales and Product Attach sales were both down y/y for our EMEA countries, which is disappointing considering the amount of time/energies/funding invested in these sales motions
11.	Content and delivery localization
12.	Delegates waiting for face-to-face classes to resume.
13.	Restructuring of our routes to market (through a shared services sales team model), requiring a lot of internal sales enablement. Keeping up with product development demand
14.	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
15.	We've seen big progress in the areas of challenge, but they remain the area of most focus: 1) driving consumption of learning 2) measuring impact. We are focused on driving adoption of certain functionality that is new to customers and learning is one of the vehicles. However, getting customers aware of courses and to attend (FOC) needs to be more effective.
16.	Hiring freeze as the company strategy is evaluated. Curriculum development keeping pace with product.
17.	CMS/LMS integration with ATP's. Ongoing
18.	Free training offers or expectations for these resourcing limits in development and delivery
19.	Achieving volume/revenue targets; Managing and reporting on our training partners
20.	Less smaller sales from the sales team
21.	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 2 years ago. Make corporate sales and the consulting organization automatically attach training to product deals or Consulting projects.

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

Worldwide

1.	We are a newer education services organization since Mar 2019 of our first paid delivery and our official Academy launch in April 2021.
2.	Our training in Q4 2021 was overall pretty good for our size, but the comparison to Q4 2020 is not complete (we were still pulling the data at EOD today, and I wanted to get this submitted before next week). It's good to see our certification program growing, and next year we plan to grow even more. A lot of our revenue loss is attributable to making our on-demand training available to customers at zero cost to them; we report internally on "training value" which is made up of the list price of the offering prior to the decision to make it zero cost - we'll be looking for ways to define this more precisely in the coming year.
3.	Overall, opportunities are increasing, and business is close to pre-pandemic levels. Online training continues to flourish. Subscription of online trainings steadily growing.
4.	I think it is very traditional and I would like to think about what it should look like in 10 years' time and prepare for that.
5.	Our broader goals of filling the need of our Market of Talent is the key for this year. Less focus on revenue, more on student headcount. Revising our catalogue to encompass job readiness vsersus traditional technical curriculum and certifications etc.

6.	Still slow due to Covid19
7.	Customers more accepting of learning remotely, VILT, rather than travelling. We have decided not to offer any more ILT (in-person public classes) - we'll leave this to partners. We're focusing on VILT offerings. Revenue returning to near 2019 levels.
8.	We continue to do well versus our financial targets - orders, revenue, profit - with growth in all these areas.
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.	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.
11.	Customer requesting more virtual offerings or blended approaches; Consumption-based offerings
12.	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.
13.	Despite the pandemic it is still healthy

EMEA

1.	Still a mix of feelings around the future of classroom training. It appears that customers want to return but IT and Facilities Departments have started to close down training rooms and have them lined up for other use as people go back to the Office. Kit from pre-COVID is out of date and IT are not willing to replace it with an uncertain future and rooms can be used to spread staff out more.
2.	Training revenues are still seeing a 10% drop in virtual classes, but ATPs have seen a 10% increase
3.	ATP's core revenues heavily impacted as they switch to 100% virtual.
4.	My sense we will not return to the level of in-class training pre-covid. We are more likely to evolve to a hyrid model
5.	We experienced overall a solid quarter in our EMEA business, especially from a profitability point of view.
6.	Addressing the Market of Talent gap has quickly become our primary goal. This requires a complete overhaul of our catalogue, message, target audience, marketing etc.
7.	Linked to above we are using in-product prompts to raise awareness of learning, and this has improved consumption of learning. We are managing the real estate in the product across functions who also have a need such as services and UX. Anecdotally I would add that lockdown has increased familiarity with remote training tools for the end-user. Courses running more smoothly with fewer technical challenges for the audience.
8.	Instructor travel is back for a very restricted number of cases.
9.	Considering hybrid training as travel restrictions ease in some locations. CMS and LMS integration with ATP's continue 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.
10.	Customer booking later and later which can cause admin issues

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