2050

State Of The Training Industry
Benchmark Report

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Introduction

Once again this year, the accessplanit team has been busy compiling data from a broad range of sectors in the learning and training industry, in order to continually improve our knowledge of the industry as a whole. Similar to the last four years of our survey, respondents have come from the fields of Healthcare; Leadership; HR; Education, and other wide and varied areas of expertise; giving us a valuable insight into your industry.

The survey has had more respondents than ever this year. With the current impact of Covid19 on our Global Training Market, this year's survey is really a temperature check for the Industry, capturing the thoughts and feelings on how the current crisis will affect the training industry.

So, how do training professionals feel about the current state of the industry, and how does it weigh-up to the past four years of results? In what areas have we progressed? How has the Covid pandemic influenced the industry this year? What's changed, and what does the future hold?

With lock down in the UK and other global locations occurring mid-survey, there is a feeling from a lot of the respondents that the pandemic is going to hit their businesses financially. There has been a great reaction from many training businesses, shifting to eLearning and Online Learning. A need for change has been enforced and the training industry has reacted to ensure its customers can continue to learn, embracing the remote world and the power of web meetings.

This year will see the largest change in how technology will be used to interface with customers, how providers administer those courses, deliver training, and gather feedback...all with trainers and students only shaking hands virtually!

I hope you will join us with interest and gather some valuable insight from this year's Training Industry Benchmark Report.
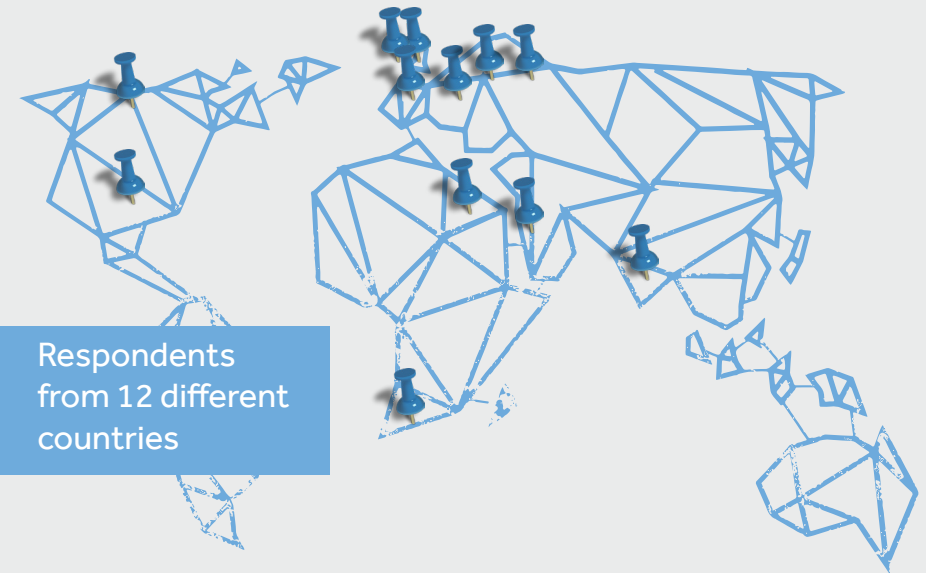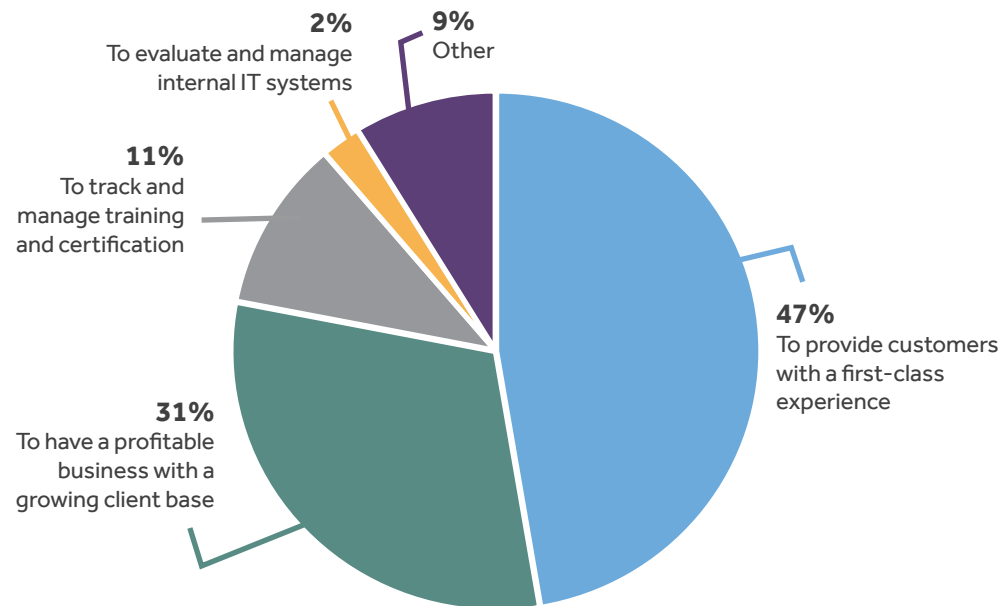
Dave Evans
Managing Director
accessplanit

About The Survey Respondents

Now in its fourth year, The State of the Training Industry Report is recognised as a good indicator of the attitudes, outlooks and aspirations of training providers globally. This year, hundreds of respondents gave us their honest opinions and outlooks for 2020.

The data analysis this year, represents a wide cross-section of industries, company sizes and job roles from a global perspective, which helps us to better understand and analyse the training industry as a whole.

The primary objective of respondents

2%
To evaluate and manage internal IT systems

9%
Other

11%
To track and manage training and certification

47%
To provide customers with a first-class experience

31%
To have a profitable business with a growing client base

## Respondents from 12 different countries

We conducted this study over a period when the CoronaVirus was hitting globally, and affecting the way that companies were being run and looking at their future prospects. Some of the data reflects the change that was going on during this period but not necessarily the outcomes for some of these businesses. Next year's survey will be a true reflection of the affects of COVID19, and how it will have changed the industry, for better or worse.

Company size

Delegates trained annualy	Percentage of respondents
0-2500	58.54%
2501-5000	19.02%
5001-10000	12.68%
10001 +	7.80%

Key Findings
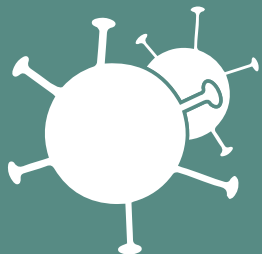
93% of businesses are already feeling the **impact of COVID19**

69% of all training providers will be focusing on some form of eLearning in the **next 12 months**

In-house and short courses are still by far the **most popular** method of training delivery

Customer satisfaction is seen as the **biggest measure of success** in the training industry today

64% of providers now take some to most of their **bookings online**

Poor quality training is a major issue in the training industry right now

Three quarters of all training professionals are **visiting training events** this year

88% of respondents are using **LinkedIn** in 2020 making it the **most popular social media platform** for training professionals

The Training Industry

Face-to-face training

Short courses and face-to-face training still continue to be the most popular choice overall for training providers this year, with 78% of providers offering in-house courses, and 73% offering short courses (which by industry standards are mostly face-to-face too). Workshops were also seen to be provided by 60% of respondents. Despite growth in online learning and eLearning delivery, this year's benchmark report continues to demonstrate the popularity of face-to-face learning experiences. However, looking to future trends on page 6, the recent affect that COVID19 has had on the industry suggests that next year's report could look very different.
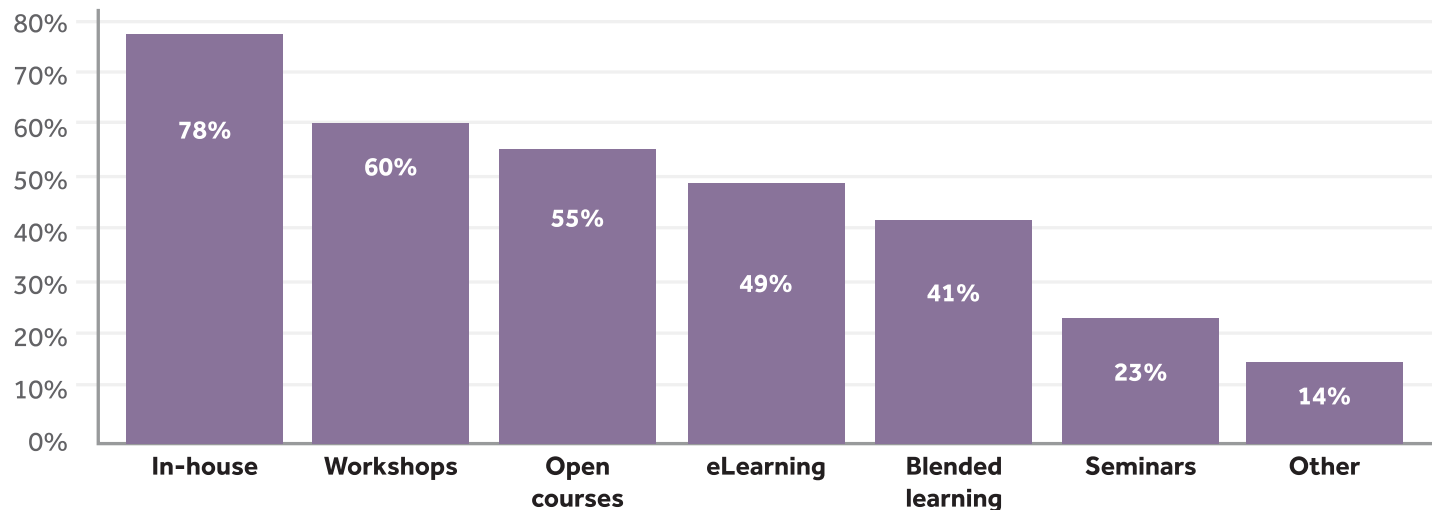
+14%
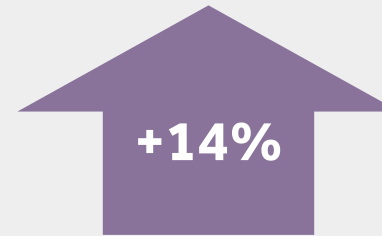
Providers offering in-house courses have increased by 14% from last year

- 7%
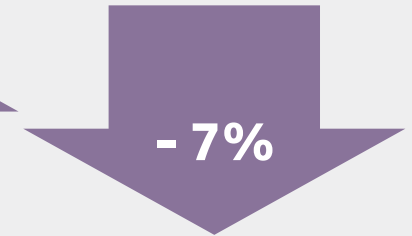
Providers looking to focus on in-house courses next year have fallen by 7%

Which type of courses does your organisation focus on now?

In-house	Workshops	Open courses	eLearning	Blended learning	Seminars	Other
78%	60%	55%	49%	41%	23%	14%

Which type of training services does your organisation focus on now?

Short courses	73.17%
Managed service	12.20%
Apprenticeships	19.02%
Distance learning	24.88%
Online self-service learning	33.66%
Gamification	8.78%
Webinar	33.66%
Augmented and virtual Reality	4.88%
Instructor-led training	82.44%
1-1/coaching	43.90%

The Training Industry

Future Trends - The Unprecedented Rise Of Online Learning

Something that is very strongly reflected in this year's Training Industry Survey, is the growing popularity of online training. As well as seeing almost 70% of respondents intending to focus on eLearning and 56% on a blended approach in the next 12 months, most of the comments attached to the 21% of providers who ticked the 'other' option, mentioned 'Live Online Training', 'Virtual Training' and 'Remote Training', among other variations of the same theme.

Which types of courses does your organisation focus on now Vs What you plan to focus on in next 12 months
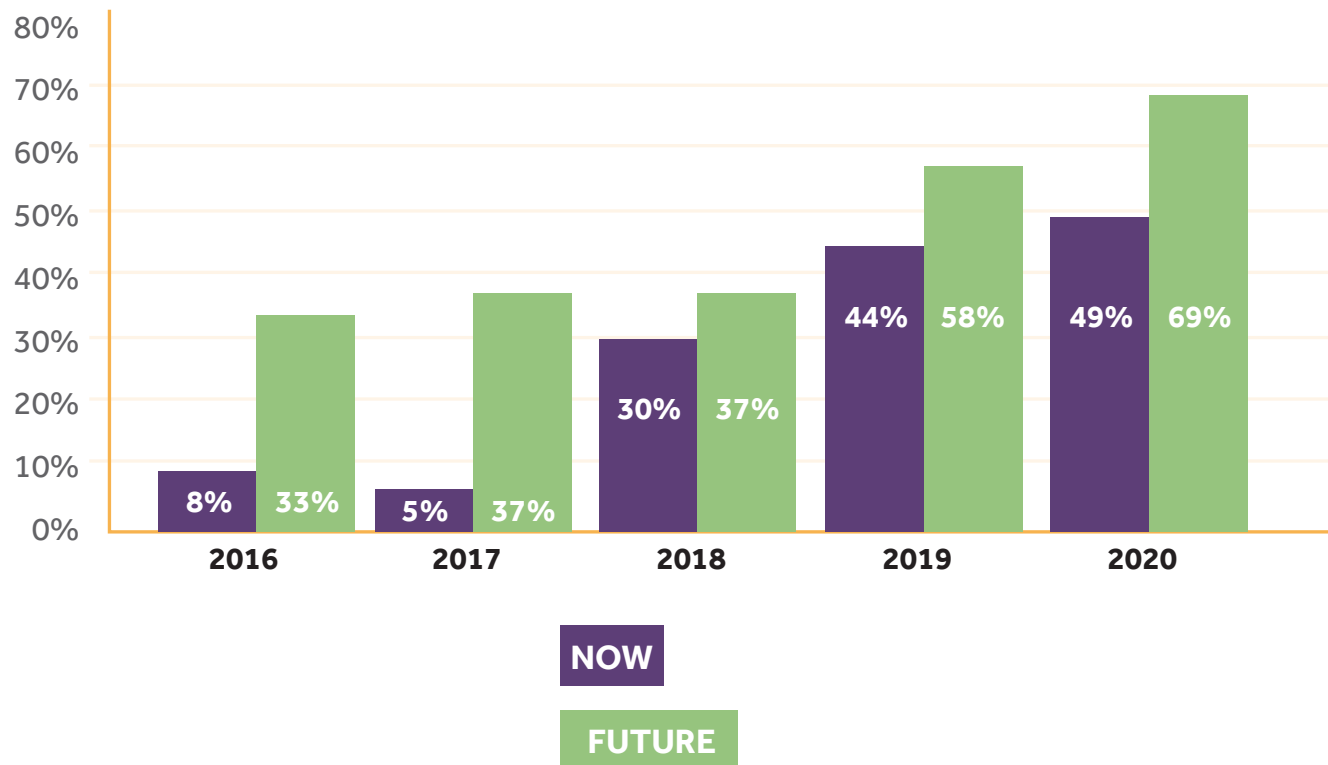

	In-house	Workshops	Open courses	eLearning	Blended learning	Seminars	Other
NOW	78%	60%	55%	49%	41%	23%	14%
FUTURE	57%	46%	40%	69%	56%	22%	21%

NOW
FUTURE
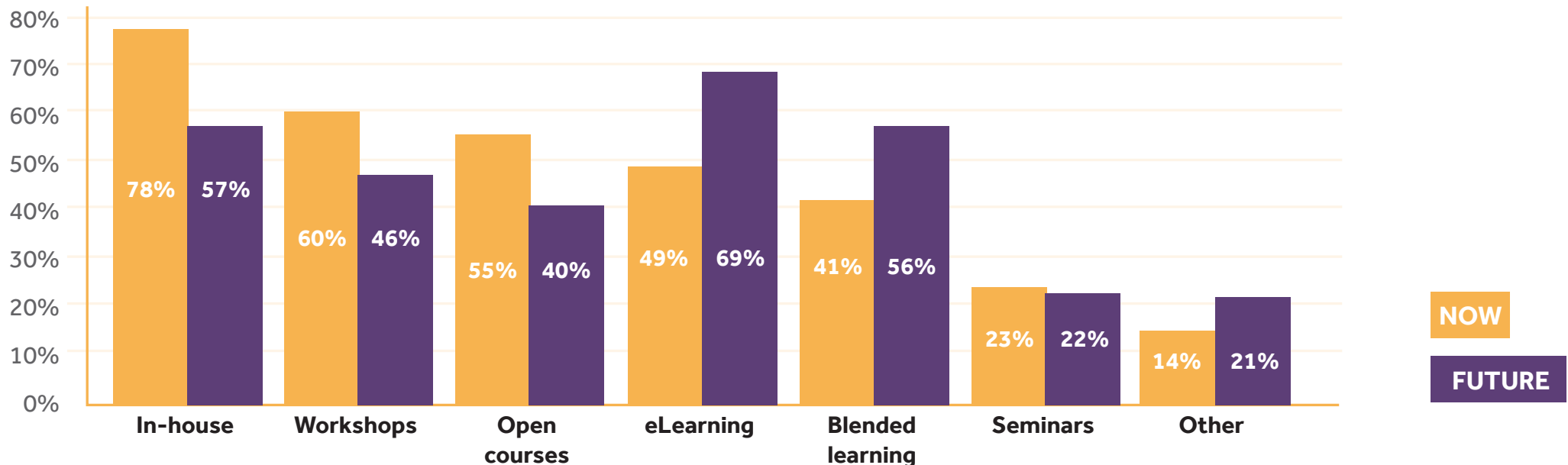
The Training Industry

Future Trends - The Unprecedented Rise Of Online Learning

This isn't a theme that's entirely due to the industry's response to COVID however. During the four years of conducting this survey, we have seen a steady level of growth in the online learning and blended learning sectors.

Percentage of training providers running online courses, and planning to do so in the next 12 months, by year

Chart data:

Year	NOW	FUTURE
2016	8%	33%
2017	5%	37%
2018	30%	37%
2019	44%	58%
2020	49%	69%

NOW

FUTURE

Why Training Providers Are Choosing Online Learning

"We need to use appropriate systems and solutions to generate high value scalable training solutions for our customers."
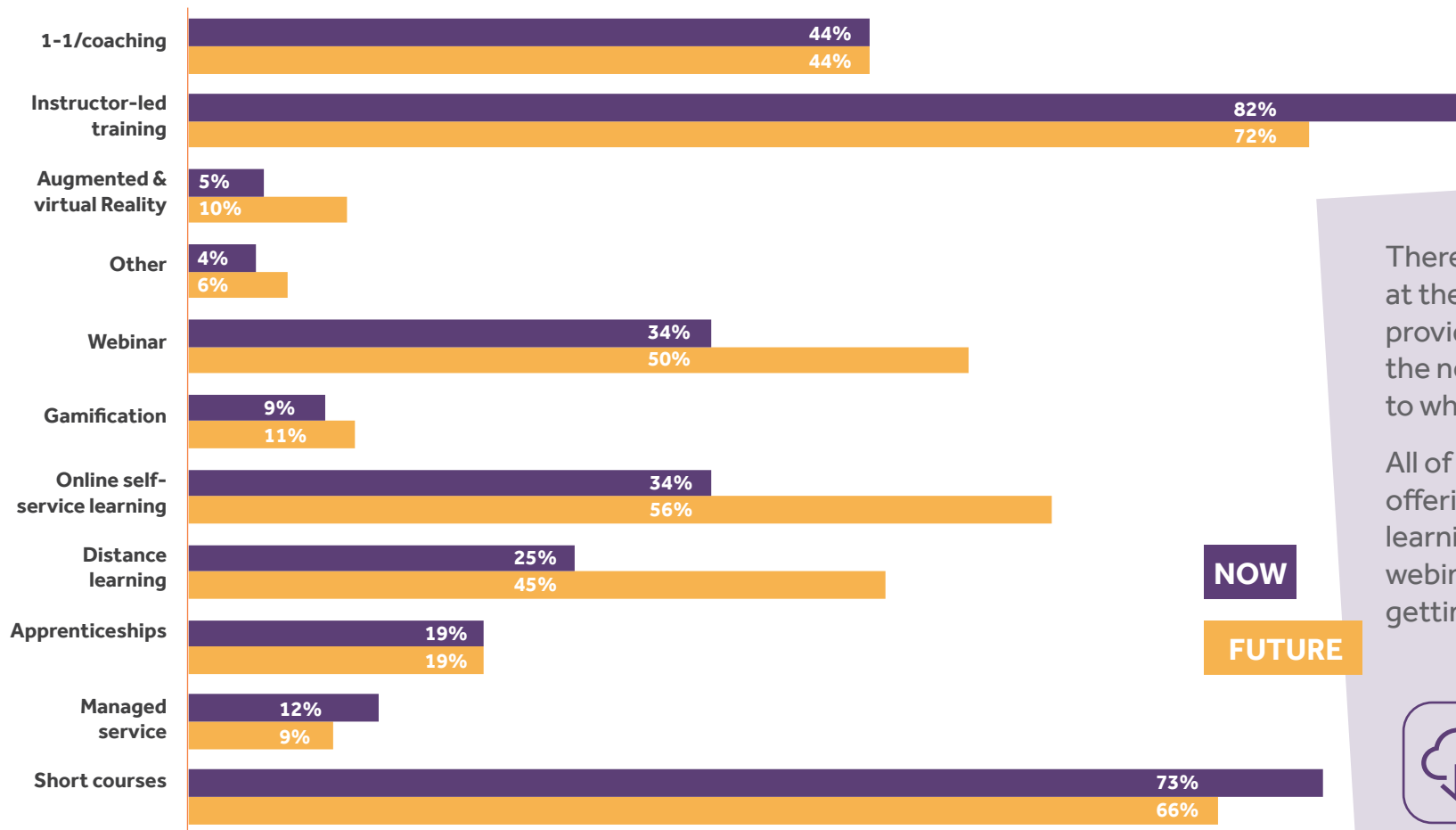
"We are optimistic about increasing our subscription-based business through micro-learning and new forms of virtual delivery."

"I believe the training market is growing and with online training, the cost is reduced greatly for organizations so the number of students being trained will increase."

The Training Industry

Future Trends - The Bigger Picture

Which type of training services does your organisation focus on now Vs Which type of training services does your organisation intend to focus on in next 12 months?

Training Type	NOW	FUTURE
1-1/coaching	44%	44%
Instructor-led training	82%	72%
Augmented & virtual Reality	5%	10%
Other	4%	6%
Webinar	34%	50%
Gamification	9%	11%
Online self-service learning	34%	56%
Distance learning	25%	45%
Apprenticeships	19%	19%
Managed service	12%	9%
Short courses	73%	66%

NOW

FUTURE

There is a clear trend when we look at the types of training service that providers are hoping to deliver in the next twelve months, compared to what they are delivering now.

All of the big spikes in future offerings are based around online learning, distance learning, webinars... well, you see what we're getting at!

Download Infographic:
Why Training Companies Should Offer eLearning

The Training Industry

How Do Training Providers Feel About The Industry This Year? COVID19

There Is a clear difference in feeling this year, from training providers asked to rate the state of the training industry. Asked to rate the state of the industry on a scale of 1-10, 1 being Poor, 5 Challenging and 10 Great, the weighted average has dropped by almost a whole point this year, bringing it closer to being characterised as 'Challenging' by most training providers.

Many providers mention COVID19 as a key factor in their decision to mark the current state of the training industry lower than they perhaps would have before March. In fact, a lot of the comments made indicate that providers had an encouraging start to the year, with plenty of new and exciting options for training facilitation, and a booming marketplace. Skewed as it has been by COVID19, training providers in their numbers are now worried about the future of their businesses and the lack of quality that is coming out of people rushing into online offerings.

2019
6.41 out of **10**

2020
5.88 out of **10**

"
Covid has forced the industry to go fully virtual

Just got a lot more challenging with Covid-19 - time to get online
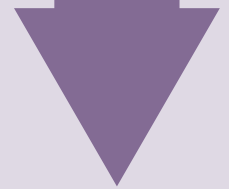
"
Evolving to primarily distance or virtual learning and many companies are not prepared for it

The sector has been hit with several issues this last year, Brexit, budget changes, covid-19 which have led to fewer bookings
"

The Training Industry

How Do Training Providers Feel About The Industry This Year?

Training Quality

Something else that providers have pointed to in great numbers, is that poor quality training is a major issue in the training industry right now. There is a growing concern amongst training providers that low-quality but cheaper online offerings are affecting their businesses negatively. This comes in a couple of different forms: One, that cheaper offerings are directly lowering the rate of bookings for the more expensive but more established and better-quality training providers. Two, that customers are losing faith in training after receiving a poor-quality experience (particularly online).
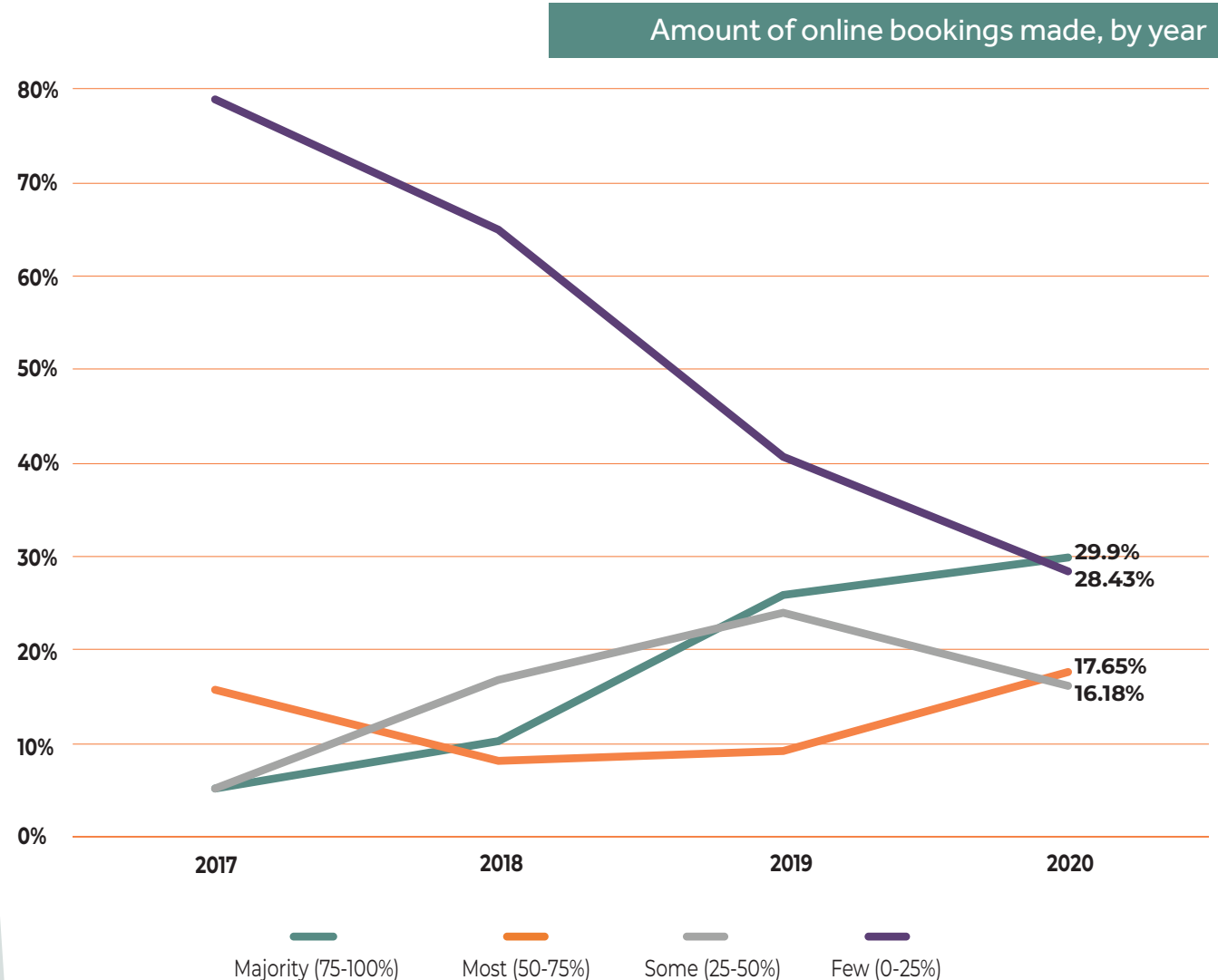
Technology

The Growing Popularity Of Online Booking

Online booking is continuing to grow in popularity amongst training providers as well as online self-service learning. The steep decline of training providers not offering an online booking options shows that year-on-year, more providers are seeing the importance of having the right tools to meet the technical demands of their customers. **63.73%** of providers now take some to most of their bookings online.

40%

Processing course bookings is in the top 3 time consuming tasks for 40.49% of providers this year.

The fact that 40% of providers still find processing bookings to be one of the most time-consuming tasks in 2020, shows that there is still room for improvement when it comes to automating the booking process for many companies. We expect the trend for online booking will continue to grow.

Amount of online bookings made, by year

Legend:
- Majority (75-100%)
- Most (50-75%)
- Some (25-50%)
- Few (0-25%)

Data labels at 2020:
- 29.9%
- 28.43%
- 17.65%
- 16.18%

Technology

The Growing Popularity Of Online Booking
Does Company Size Have An Impact?

When comparing company size against the amount of bookings taken online, we can see that the largest training companies are way ahead when it comes to taking online bookings. Surprisingly, there is not much difference between the other three sizes, indicating that smaller training companies are certainly seeing the benefit of investing in self-service for their customers.

We've all experienced online booking- it's second nature to most of us. We understand the importance of online bookings for sales in the modern world.

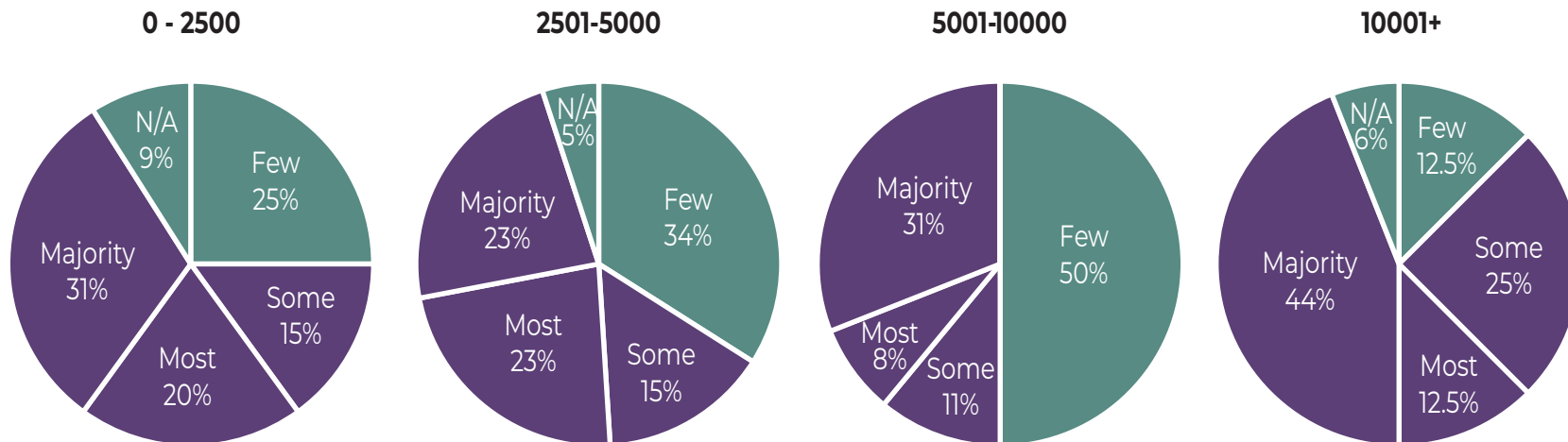Are you currently offering an online course booking facility for your training business? In this fast-paced modern world, where everything is available at the touch of a button, if you've yet to implement a system that allows online course bookings, you're already playing catch up...

Read More:
Online Course Booking - 8 Easy Tips To Maximize Sales

Online Bookings taken, by amount of delegates trained annualy

0 - 2500

N/A 9%
Few 25%
Some 15%
Most 20%
Majority 31%

2501-5000

N/A 5%
Few 34%
Some 15%
Most 23%
Majority 23%

5001-10000

Few 50%
Some 11%
Most 8%
Majority 31%

10001+

N/A 6%
Few 12.5%
Some 25%
Most 12.5%
Majority 44%

Technology

The Biggest Administrative Pains Vs Use Of Technology

40%
Processing course bookings and enquiries
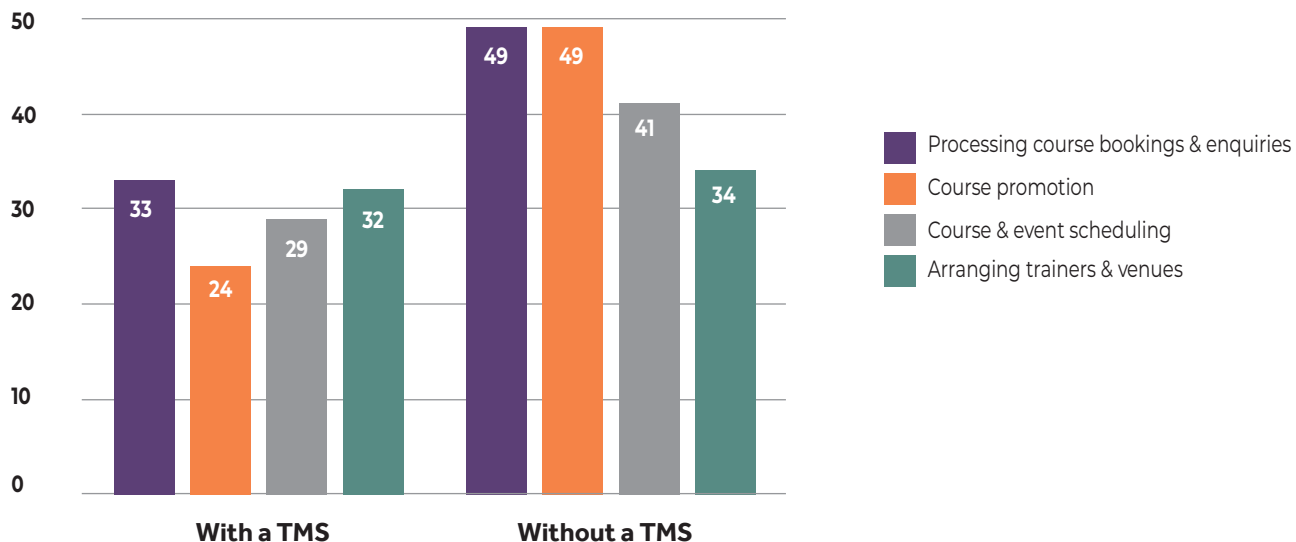
36%
Course Promotion

35%
Course and event scheduling

33%
Arranging trainers and venues

### Administrative pains Vs Use of a Training Management System

Chart legend:
- Processing course bookings & enquiries
- Course promotion
- Course & event scheduling
- Arranging trainers & venues

With a TMS: 33, 24, 29, 32
Without a TMS: 49, 49, 41, 34

Four of the leading biggest administration pains for training providers in 2020 are technology-based.

This speaks volumes when you look at the providers who use a Training Management System, Vs those who don't. Using technology to aid with processing bookings, promoting your courses and scheduling events and trainers has a real impact on the amount of administrative pain and time wasted day-to-day.
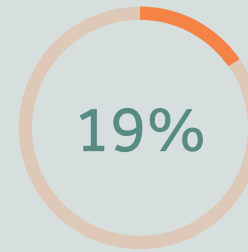
Technology

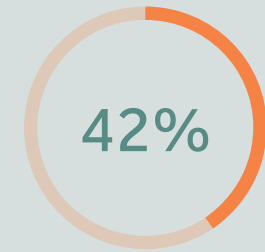## Systems that training providers are using in 2020

41%
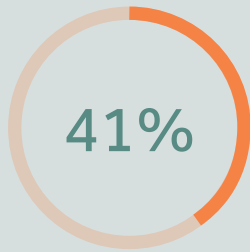
Of training providers still use **spreadsheets** to manage at least one aspect of their business

34%
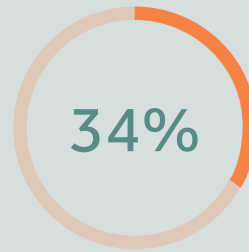
Use a **CRM** (Customer Relationship Management) tool to help run aspects of their business

19%

Of providers use an **LMS** (Learning Management System) to help them run their training business

42%

Of respondents use a **TMS** (Training Management System) like accessplanit

Although we've seen a raise year on year, of companies using training management software to run their training organisation admin and marketing; there is still a solid 41% of providers relying on spreadsheets to manage their business.

The **risks of using spreadsheets** to run a training business in 2020 are numerous. According to a report by YouGov: 33% of large businesses report poor decision making due to spreadsheet problems, and nearly 1 in 5 large businesses have suffered direct financial loss due to poor spreadsheets.

The need for an efficient system to run your training business is clear in 2020, and with the inevitable growth of online bookings and enquiries across all industries, we are unlikely to see a decline anytime soon, in the need for better use of technology in the training industry.

Download eBook: 10 Ways To Eliminate Manual Processes

Sales & Marketing

How Are Training Providers Marketing Their Courses?

+33%

Use of paid advertising has risen to 33% this year!
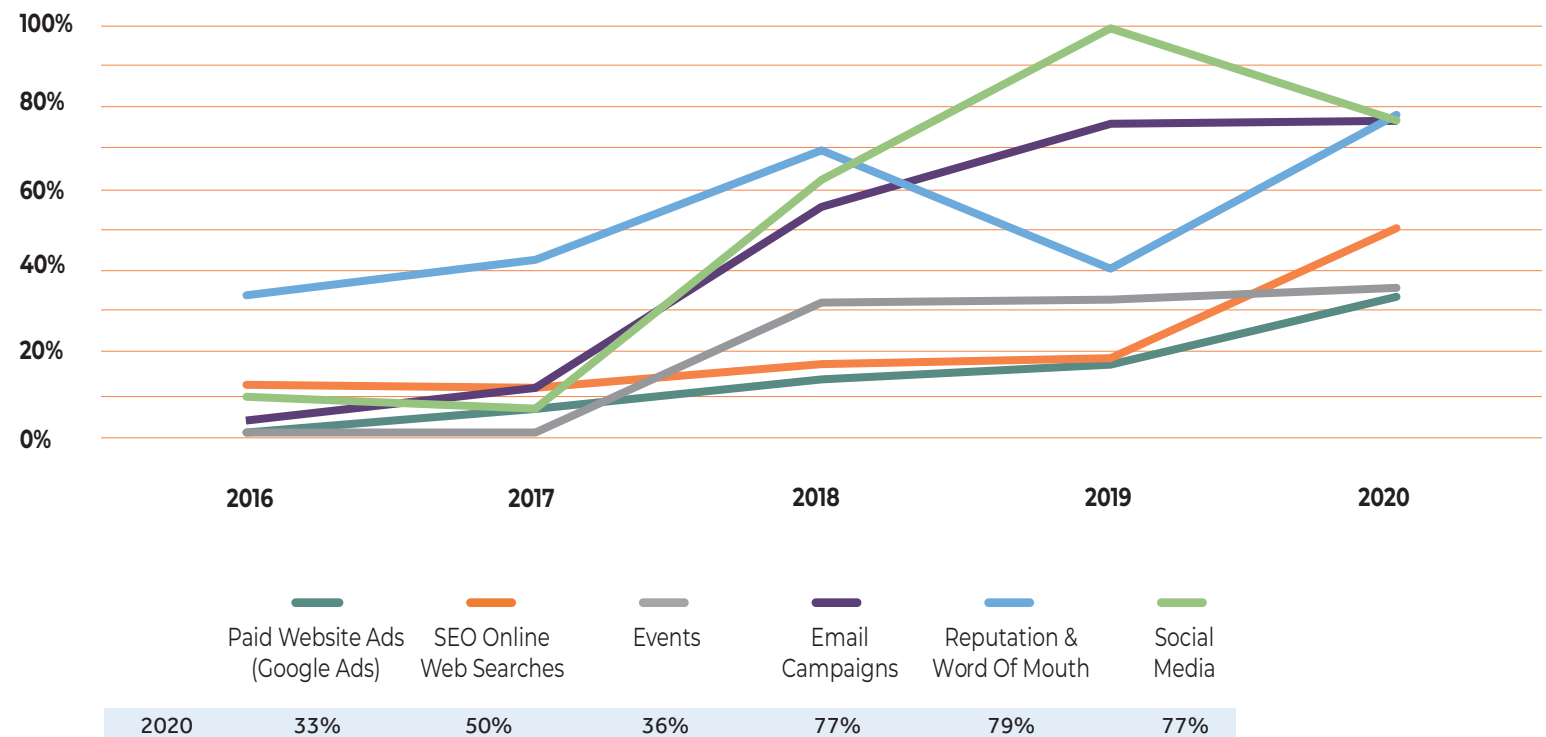
-23%

Providers relying on social media for exposure has dropped from 100% last year, to 77% this year.

This year has seen a huge rise in the use of paid advertising and SEO as a means of marketing courses, with half of all respondents now actively pursuing SEO to drive sales, plus a jump to 33% (2020) of providers now using paid advertising. This strengthens the trend we have already seen for the growth of online bookings and the use of technology throughout the industry.

An interesting result this year has been the lessening of reliance on social media for marketing. This could be directly resulting from the growth in other areas, such as paid ads, which are potentially returning more significant results.

|	Paid Website Ads (Google Ads)	SEO Online Web Searches	Events	Email Campaigns	Reputation & Word Of Mouth	Social Media
2020	33%	50%	36%	77%	79%	77%

Sales & Marketing

Social media use

As a representative percentage of how marketing is split between the main social media channels, LinkedIn is yet again this year, the industry favourite. This isn't surprising, considering most training companies are looking at procuring delegates from other businesses.

+32%
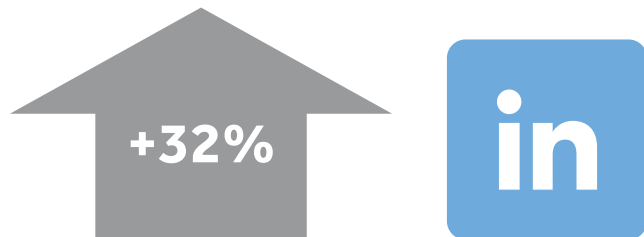
Training providers using LinkedIn to secure business has gone up by 32% this year. 56% of training providers used LinkedIn last year, compared to the whopping 88% of respondents in 2020.

For the first time this year, we asked if providers were using YouTube, and were surprised to find that 24% of respondents used YouTube to market their courses. Using video is a great inbound marketing technique, that our friends at Digital 22 talked about at our last Everest Training Conference... **Read about this and other inbound insights here.**

Percentage split of social media use within the industry

- None 2%
- YouTube 9%
- Instagram 9%
- Twitter 21%
- Facebook 25%
- LinkedIn 34%
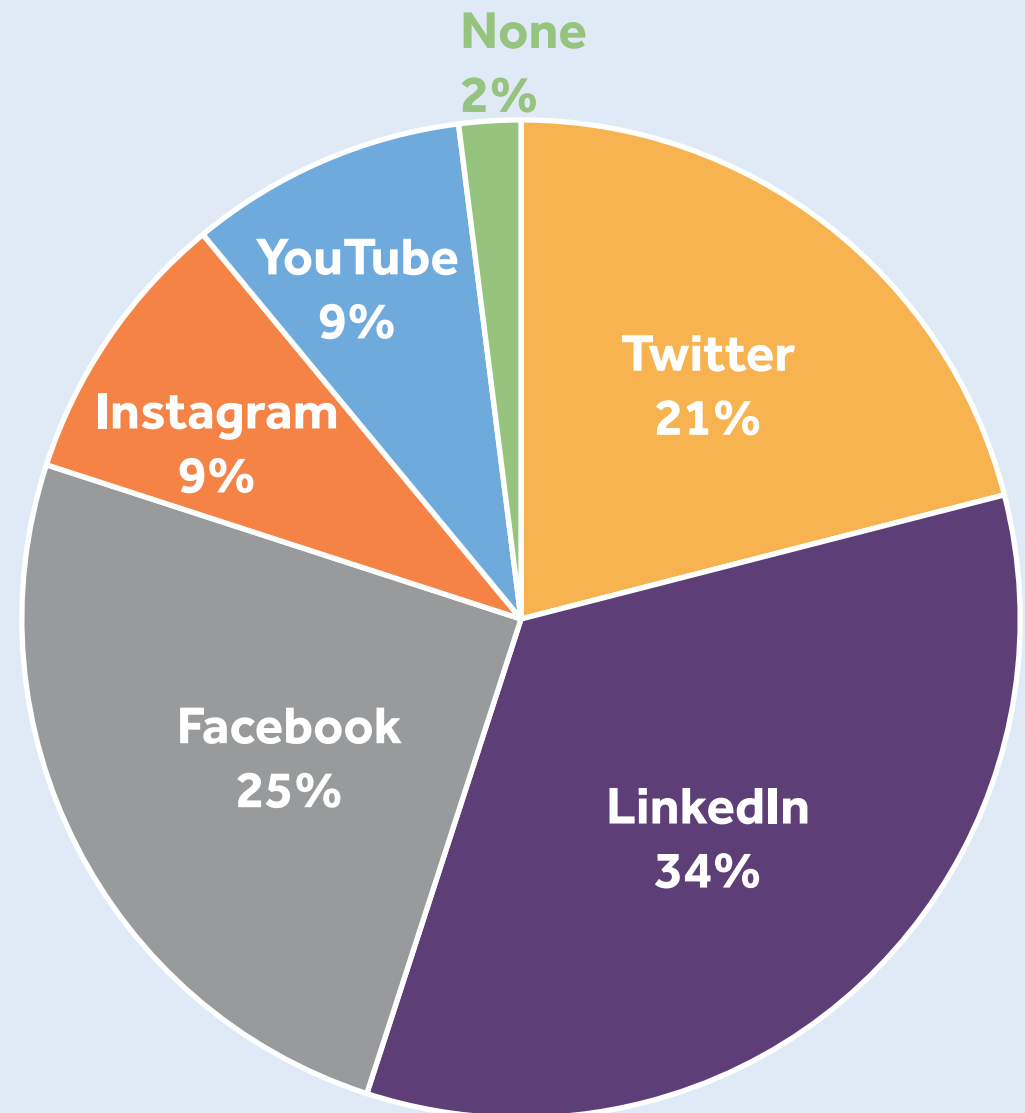
Sales & Marketing

Keeping up with Industry Trends

Yet again this year, training providers have been opting to attend events and conferences as a way of keeping up-to-date with industry trends. This seems an interesting outcome considering the move to digital that's happening across other areas of the industry. However, one reason for this increase is a rise in providers attending events, is that it offers them options and information on modernising and digitising their business. Training providers will always discover a wealth of information in one place at industry events; information that is tailored to them, saving them valuable time that would otherwise be spent trawling the web for information. It is clear that having this dedicated resource is just as important in the digital age as it ever was.

Will we see this change post-COVID19? Many conferences are opting to go online this year, as they are unable to host their events, so we may see a significant shift in this trend next year.

Percentage of providers visiting events and conferences by year
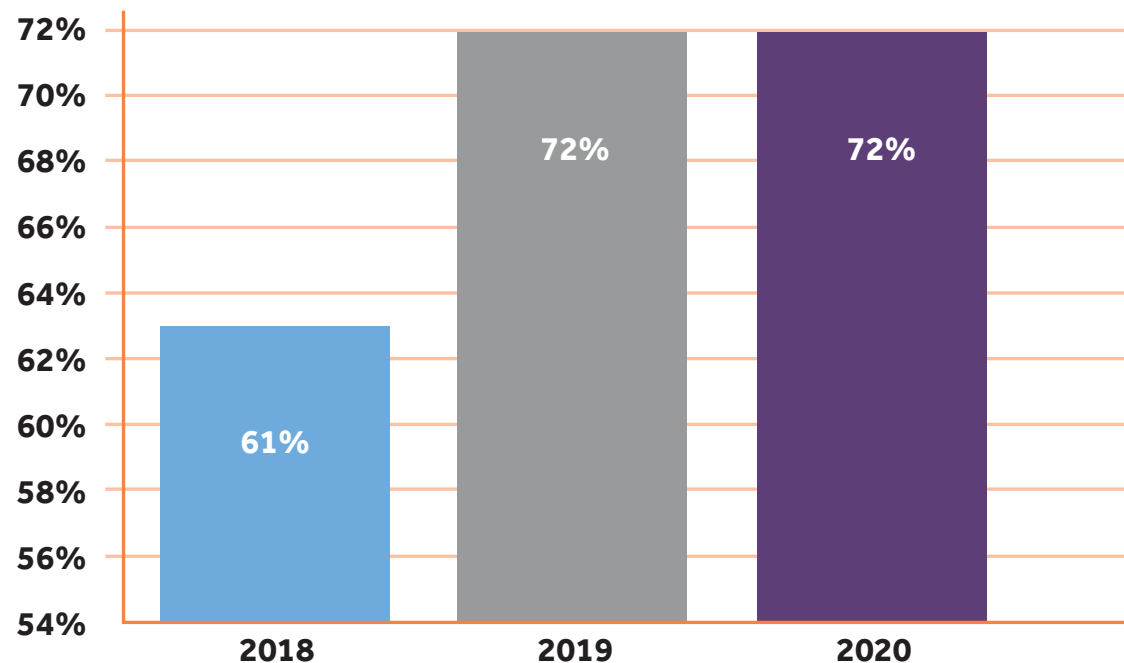
Join Our Digital Everest
accessplanit are hosting a digital event this year, especially for training providers

Sales & Marketing

Keeping up with Industry Trends - Resources For Training Providers

TrainingZone.co.uk

The name says it all; this site is a zone for training. If you want any information or updates on training, TrainingZone is the place to go.

The site offers content from leading industry professionals including blogs, whitepapers, podcasts and articles. All content is segmented however, if you're not looking for anything in particular the site offers 'Trending on TrainingZone' and 'Popular Resources' sections to provide you with a bit of inspiration.

TrainingZone also provides a great community platform to start discussions in order to gain feedback from other training professionals or provide your own insight into ongoing topics.

TrainingIndustry.com

TrainingIndustry.com are the experts that brought us Training Industry Magazine. They are leading thinkers on the field of learning and offer best practice and innovative ideas on how to better serve your learners. Content is suitable for both learning and development professionals as well as those providing commercial training and comes in the form of blogs, articles, webinars and a wiki page.

Topics covered include Compliance, Content Development, E-Learning, Leadership, Learning Technologies, Training Outsourcing, Strategy, Alignment and Planning and Workforce Development.

eLearning Industry

eLearning Industry is focussed on providing up to date content to eLearning professionals. The site offers a knowledge sharing platform to help eLearning professionals connect.

Popular topics include Corporate eLearning, Microlearning, Learning Management Systems, eLearning Design and Development, Authoring Tools and Educational Technology.

Measuring Success

The Customer Is King

78%
Customer satisfaction is seen as the biggest metric for success

63%
Repeat business is seen as the second biggest metric for success

44%
Course attendance is seen as the third biggest metric for success

This year, we asked participants what metrics they use to measure success. The highest scoring metric by far was customer and delegate satisfaction.

Customer satisfaction is extremely important to the retention of delegates, and it's not surprising that this is considered the most important amongst training professionals.

Second and third highest metrics used are repeat business and course attendance, lending even more weight to the fact that the customer is the number one consideration for training providers when measuring the success of their courses. Repeat business as a metric has almost doubled from last year, over-taking both course attendance and course registrations to take second place.

Correlating with these statistics, we have also found that gathering satisfaction data via electronic means has been steadily rising over the past four years; more than doubling since 2016. This suggests that more efficient methods are being employed to collect the necessary metrics for success, as more providers are realising the importance of collecting and utilising satisfaction data.

What metrics do you use to measure success?	2020
Customer/delegate satisfaction	78%
Course attendance	44%
Course registrations	39%
Course completion	41%
Repeat business	63%
Course profitability	40%
Delegate knowledge retention	33%
Sales leads	17%
Other	8%

Measuring Success

Collecting Feedback

### Collection of feedback via paper forms, by year
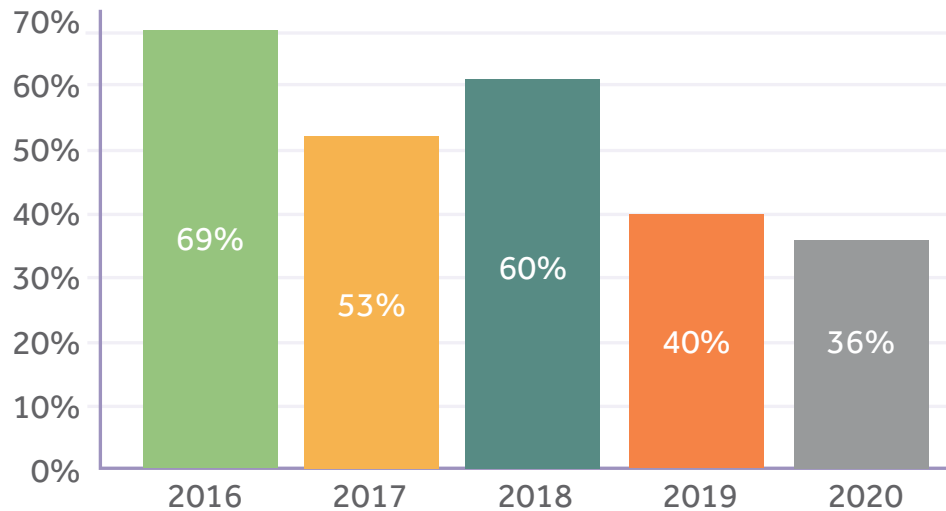
This year has revealed another drop in the use of paper happy sheets, with more training businesses turning to online evaluation forms - the use of which has almost doubled since 2016.

This is good news considering the many downsides to using paper happy forms; like the environmental impact of using paper, and the impact on admin time- of collecting and collating data.

Online evaluations allow businesses to easily collate and report on customer satisfaction, allowing your admins time; time that can be spent using the data collected for re-marketing and revising learning plans, based on the data collected.

Other methods used to collect feedback
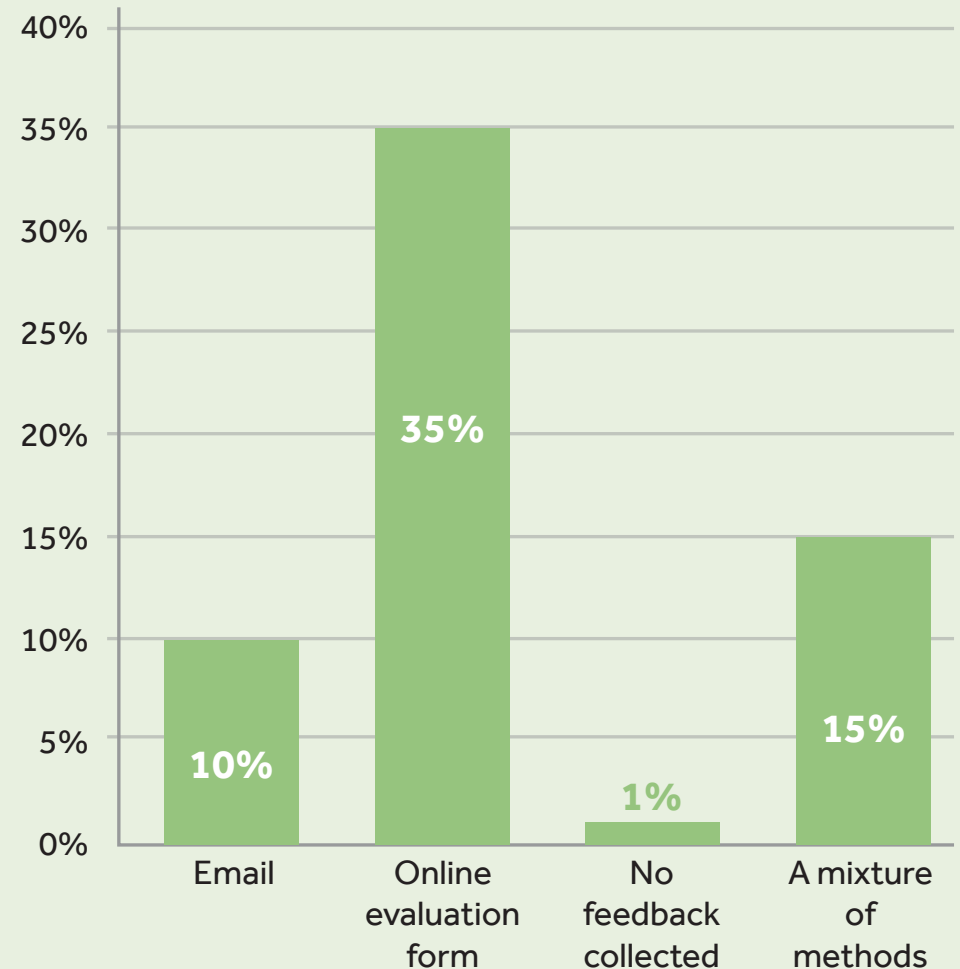
Measuring Success

Why Use Online Evaluation Forms?

Interestingly, we have found that training providers that measure success by delegate There are several obvious benefits to collecting digital feedback over paper-based methods. It could be said that one benefit of using paper forms is the higher completion rate; however, this is made almost completely redundant when you consider that feedback could easily be influenced by the presence of the trainer in the room (intentionally or non-intentionally).

Digital feedback is more honest and therefore more insightful; people feel more comfortable giving feedback in private and in their own time. Another benefit to collecting data digitally, is the ability to perform real-time and in-depth analysis.

Make The Most Of Customer Feedback

Establish KPIs

Knowing what your Key Performance Indicators are before even designing your form will help you tailor your responses; to give you the most valuable information, and help you establish patterns for analysis.
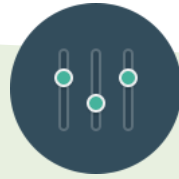
Setting Targets

It's important when reflecting on your feedback, that you use it to set targets and future goals for your courses. This might be to increase the satisfaction, or retention rate of your learners; it could also be something like deciding what parts of the course to change or drop.

Share Results

Sharing the results with your company or team, can help raise moral if the feedback is good; or could even give that much-needed kick that your trainers need to change something about the way they are running courses, or even the content of the course.

Make It Matter

If you don't use feedback where it matters, you might as well not collect it at all. A great way to see instant results, is to use it to incentivise your employees. Some ways of doing this could be: leader boards; prizes; awards, and monetary incentives for employees that are consistently hitting high targets.

Impact of CoronaVirus

The Industry Reaction To COVID19

A whopping 93% of respondents in our survey are feeling or expect to feel the impact of COVID19 on their businesses. Many providers have chosen to shut-up-shop for the duration, while others are hastily taking as many courses as they can online. It's not all doom and gloom however, as trainers who are able to run courses online are expecting a rise in people training from home.

Do you feel CoronaVirus has impacted your organisation in any way yet or will impact it in the coming year?

Bar chart showing: Yes 93%, No 7%

"
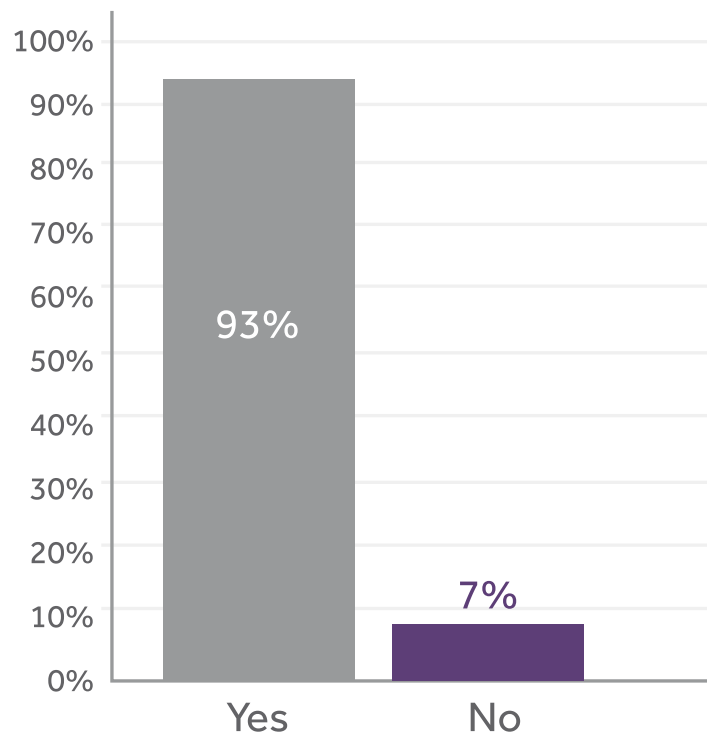
We've lost 50% of our business and clients are putting external training on hold to save money for 2021. However there are opportunities still out there for virtual training - 50% has moved online. It's knowing which businesses are still willing to invest at the moment. Ironically it's a perfect time to deliver training!

The vast majority of our training is in-person and relies on travel and group gatherings, so Coronavirus has had a significant impact.

Clients are slower to make payments; close-rate percentages have dropped.

If big companies start cutting costs and staff, that will effect those who can afford professional training.

It's likely to help us, as millions more forced to work from home. Saving in commute time can be put to use in training without damaging daily (short term) productivity.

We're providing more live, virtual learning; virtual 1-1; group, and team coaching.

We had to switch all our face to face classes to online classes.

Lots of cancellations and delays.

Has us far more focused on eLearning products.

Cancellations and postponements with no expectation of paying or rebooking when this is over. We have had to be fast and agile to respond with virtual solutions, to replace the face-to-face work which was the majority of what we did.

"

Future Proofing

Biggest Opportunities for training providers in 2020
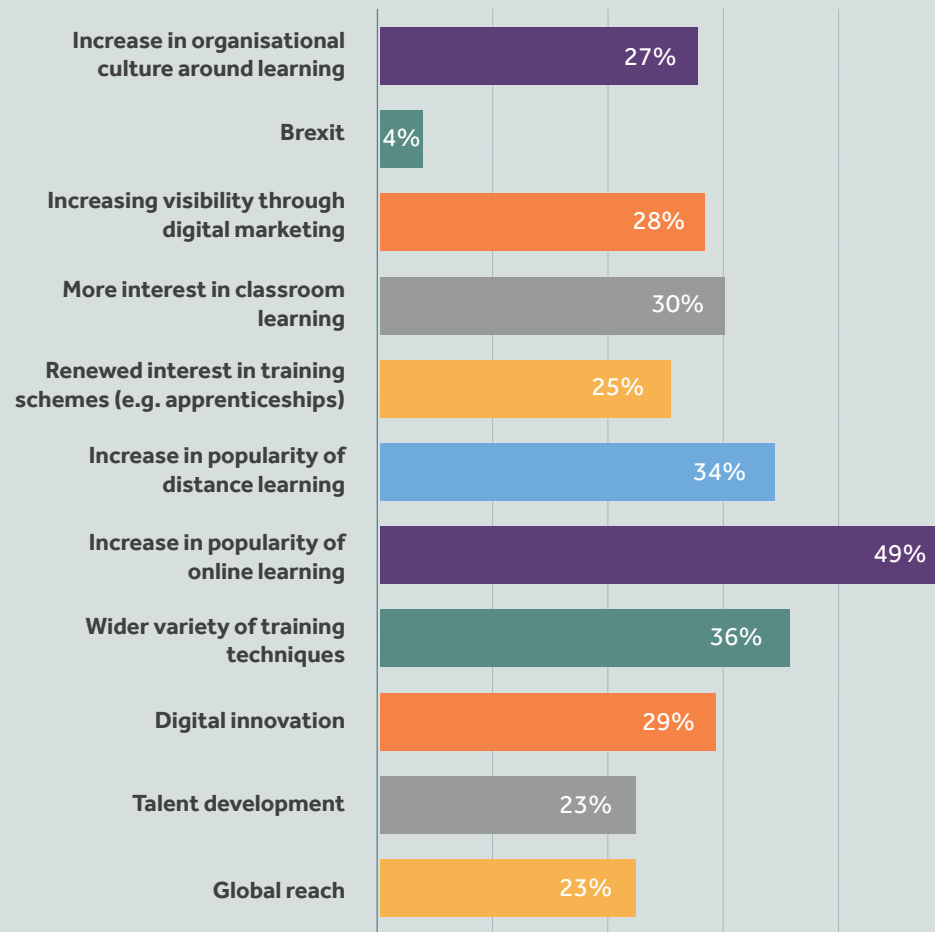
Unsurprisingly, this year's biggest opportunity was highlighted to be the increase of popularity in online learning, with **16%** more training providers citing it as an opportunity, compared with last year's results. **22%** more training providers chose the increasing popularity of distance learning this year too. This has an obvious correlation with the overall sentiment that 2020 is the year of eLearning.

Global reach has also seen a surge in popularity this year, when it comes to what providers are seeing as big opportunities in the industry. Only **8%** of respondents saw global reach as an opportunity last year, compared to a more impressive **23%** this year- that's an increase that again, shows where provider's priorities lie in 2020. Global reach has a direct correlation with the wider use of technology and the expansive growth of online learning.

Opportunity	Percentage
Increase in organisational culture around learning	27%
Brexit	4%
Increasing visibility through digital marketing	28%
More interest in classroom learning	30%
Renewed interest in training schemes (e.g. apprenticeships)	25%
Increase in popularity of distance learning	34%
Increase in popularity of online learning	49%
Wider variety of training techniques	36%
Digital innovation	29%
Talent development	23%
Global reach	23%

> " We have to utilize every technological tool to maintain connectivity with our clients, especially during these unprecedented times. "
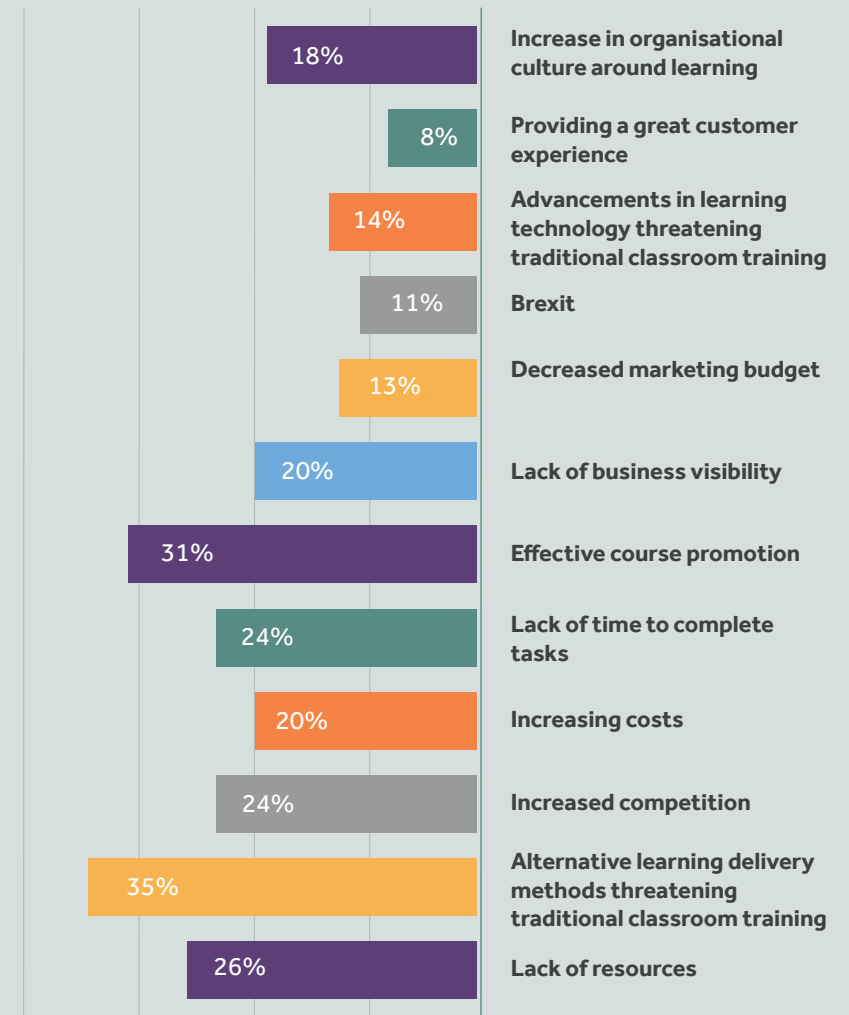
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Biggest Challenges for training providers in 2020

Interestingly, the biggest concern for training providers this year (apart from COVID19, is alternative delivery methods threatening traditional classroom training. With **13%** more respondents choosing this as an issue for them this year, it points to the fact that, although online delivery is seen as an opportunity to some, it is also seen as a big challenge for many.

Providing a great customer experience is not seen as much of an issue for training businesses this year, dropping by half this year. This reflects the fact that customer experience is seen as one of the biggest indicators of success, so perhaps something that providers feel that they are already focussed on, and an opportunity rather than a challenge.

Of course, the main challenge for providers right now is CoronaVirus! Of the **26%** of providers who gave us an alternative suggestion for their biggest challenge, a huge **72%** of them said COVID19

> " Without a doubt, COVID19. People not travelling, not gathering. Face to face training is at a standstill until further notice. Must concentrate efforts on maintaining client relationships as wholesale bookings are cancelled. "

Challenge	%
Increase in organisational culture around learning	18%
Providing a great customer experience	8%
Advancements in learning technology threatening traditional classroom training	14%
Brexit	11%
Decreased marketing budget	13%
Lack of business visibility	20%
Effective course promotion	31%
Lack of time to complete tasks	24%
Increasing costs	20%
Increased competition	24%
Alternative learning delivery methods threatening traditional classroom training	35%
Lack of resources	26%

Conclusion

So, what have we learnt?

Technology is king

From eLearning, webinars, and online training, to the rise of online bookings and the decline of paper-happy sheets, it's clear that 2020 has and will be the year of digitisation for the training industry.

The implications that COVID19 and the lockdown have had on the industry so far, have clearly accelerated an already steep trend toward the use of technology- and all indications are that this change is here to stay.

2020 is looking like a year of opportunity for businesses who are willing to modernise, and training providers who have already made changes are already reaping the benefits of being prepared with online offerings, especially over the past few months.

The use of paid advertising and SEO to market training courses is yet another technological trend that has been steadily on the increase over the last four years, and doesn't look to be slowing. Investing in digital marketing is something that all savvy industry leaders should be looking to do in the present climate.

The use of intelligent systems to manage training can really aid providers with administrative tasks like processing course bookings and enquiries, and scheduling trainers. Providers who use Training Management Systems find that administrative pains are significantly lessened.
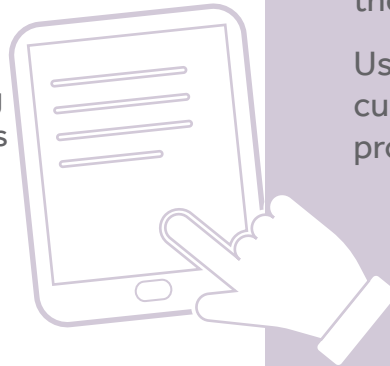
COVID is affecting everyone

With 93% of training providers either already feeling the pinch, or expecting to this year, COVID19 has definitely rattled the industry this year.

With many providers citing COVID as their reason for making changes to their online delivery and management systems, we can expect to see some big shifts over the course of 2020 and beyond.

Without a doubt, offering online learning, online booking and managing remote working with the use of smart systems is the way forward for training providers who want to keep ahead of the curve in this fast-changing climate.

The customer comes first

With customer satisfaction, repeat bookings and course attendance being on the top of the list for trainers this year as a measure of success, it's clear that customer satisfaction is extremely important to the retention of delegates, and it's not surprising that this is considered the most important amongst training professionals.

Using technology and making bookings easier for customers being on the rise suggests that training providers are taking customer experience very seriously.

About accessplanit

accessplanit is a software house dedicated to the ongoing development of the most powerful web-based learning and training management system available today. Our system streamlines business processes, automates communication, and provides effortless end-to-end solutions from course registration through to reporting.

Now you can take control and obtain a full overview of your entire training business – making decisions simpler and life easier. Our team is dedicated to working closely with customers to ensure that after implementation your platform delivers immediate results and adds value. Our purpose: making life easier for customers!

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t: 0845 543 0229
www.accessplanit.com