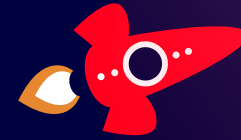


2022

State Of The Training Industry Benchmark Report.



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Introduction

We are excited to share our latest Training Industry Benchmark Report. This is our 6th year taking the pulse of the training industry and to understand key trends in training delivery, technology, sales and marketing and the challenges and opportunities facing training providers. This year, we have also surveyed learners to understand how the demands of the market are being addressed by training businesses.

The period of 2021 moving into 2022 has been a transitional phase as we have seen the removal of the majority of social distancing measures. This has seen in-person training methods return to something resembling normality but with the added benefits for both learners and providers, stemming from new technologies implemented during the pandemic.

This benchmark report has been designed to inform decision-making and provides an understanding of how other professionals perceive the industry in 2022, how this compares to previous years, and the opportunities and challenges that lie ahead.

I hope you enjoy accessplanit's 2022 edition of the Training Industry Benchmark Report.

Hannah Churchman

Managing Director



About the Survey Respondents

Now in its sixth year, the State of the Training Industry Benchmark Report captures thoughts, feelings and attitudes across a wide demographic in the training industry. Every year, we gather data from the widest range of training industry experts. This helps us to provide an holistic and realistic overview of the trends, patterns and changes to the industry each year.

Each training professional has different aims, objectives and interests within their role, both for their business and within the industry more generally. For this reason, we have aimed to capture the thoughts of **4 key personas** we know to exist within the industry. This helps us to better understand the responses to each question and draw more accurate conclusions from our data.

The primary objective of respondents



- 42.86%** To have a profitable business with a growing client base
- 30.95%** To provide customers with a first class experience
- 19.05%** To evaluate and manage internal IT systems
- 7.14%** To track and manage training and certification

This year our highest representation was from professionals working within small to medium sized training companies with anything up to 5000 delegates trained annually. These numbers allow us to showcase a demographic that represents the majority of training companies in the UK today. It is important to have a cross-section of representation however, so we make sure to include some of the larger training businesses as respondents also.

Respondent company size

Delegates trained annually	Percentage of respondents
0-2500	50%
2501-5000	23.81%
5001-10000	4.76%
10001+	21.43%

Key Findings



Instructor-Led Training (ILT) is still the **most popular training delivery method** in the eyes of both providers and learners



Digital learning methods including **podcasts, webinars, videos and quizzes** are being incorporated into traditional training



Processing bookings and enquiries is the **most time consuming administrative task** for **50%** of training professionals



30% of respondents are still **not offering online course booking** as an option for their delegates



Word of mouth remains the **most effective** marketing channel, being relied upon by **over 80%** of respondents



A third of respondents identified **increasing costs as a key challenge** for 2022



76% of training professionals see **customer satisfaction** as the biggest metric for success



Less than 10% of training providers **now rely on paper 'happy sheets'** - down by 60% from 2016



This year's biggest opportunity is the **increase in popularity of online learning (67%)**, closely followed by **digital innovation (40%)**



Over 88% of training providers are using **LinkedIn to promote their business**, whereas search engines are the most popular tool for learners

The Training Industry

Showing a personal side

Unsurprisingly, COVID-19 has left us all missing a bit of human interaction. This really shows in the choices of course type that training providers are running this year.

Last year, **70% of training providers** expected to be running some sort of eLearning offering by 2022. However, the reality is that only **50%** of respondent training companies this year are running online courses.

Workshops are the clear winner this year, with **70% of providers** choosing to run some form of workshop. This is possibly indicative of a need for more personal, face-to-face time with learners. This also matches sentiment from learners (**See pg 21**).

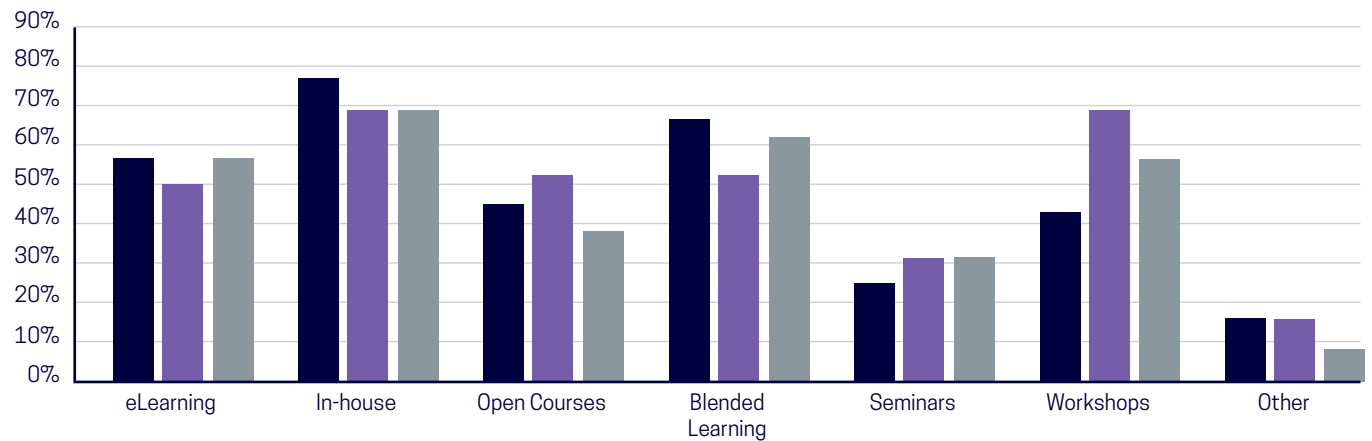
In-house training is also going strong, showing that despite the press that is being given to the 'rise of digital', the most popular option for most trainers and learners is still the old-faithful, in-house, face-to-face experience.



Guide: Checklist For Trainers Returning To The Classroom

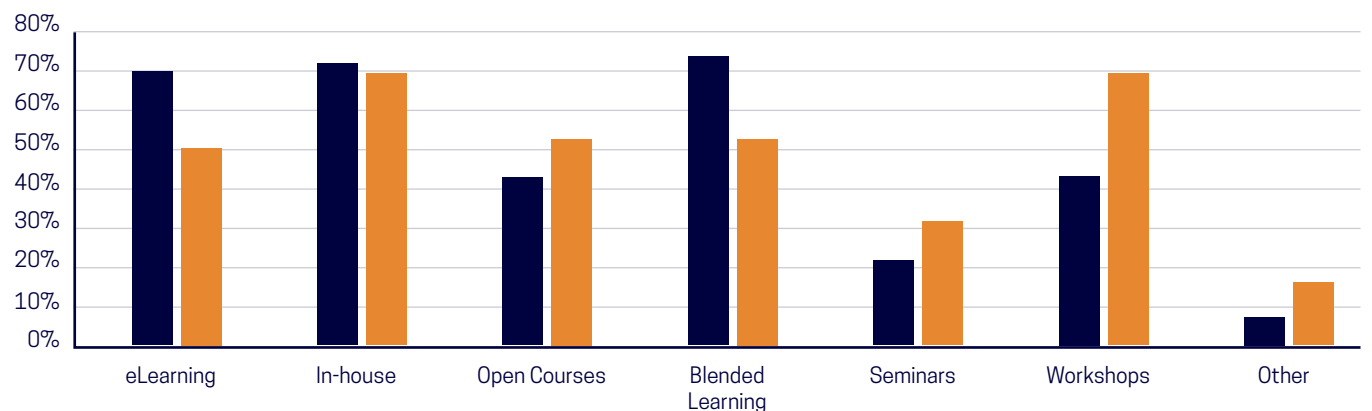
The types of courses training providers are running in the past, present and future

● 2021 ● 2022 ● Future



Expected vs Reality

● 2021 Predictions ● 2022 Reality



The Training Industry

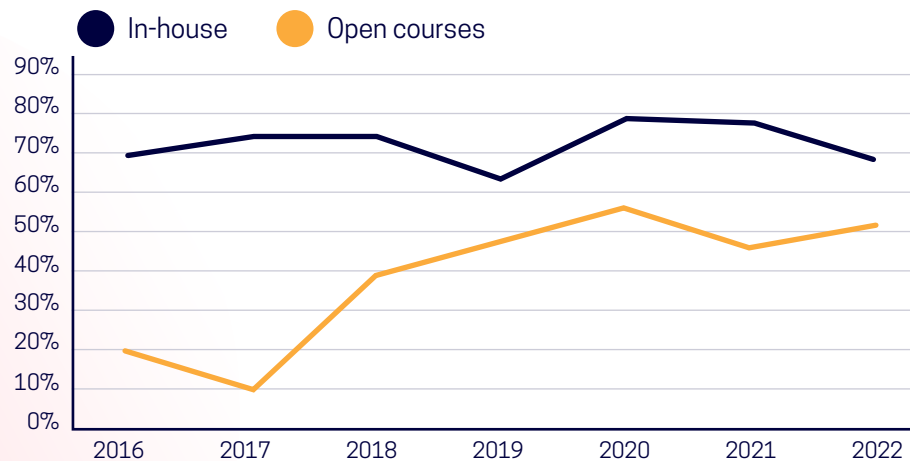
In-person training isn't going anywhere

It seems that year-on-year our data reveals the same thing when it comes to **in-person training** through both **in-house** and **open courses**. The preferred method of delivery by training providers is face-to-face classroom training. This year **69%** of respondents reported having some sort of in-house course running. This trend has remained strong through every year of the training industry survey since 2016.

Following not far behind in-person training is the choice to deliver live virtual training, with 86% of trainers opting for a live online delivery. The **live digital** option is more

popular than standard **eLearning (52%)** showing that although online training has become a necessity for trainers and learners alike, the more personal option is and always has been the most popular.

Last year, **open courses** were expected to continue in their volatile downhill trend, dropping at least a further **2% from 2021**. However, in true volatile fashion, open courses are now trending again- having **increased in popularity by 10%** from last year. We put this change down to the reduction of COVID-19 precautions, as well as the aforementioned desire for more human interaction, leading to both open and in-house face-to-face training being the stand out winners this year.



Training companies are diversifying

Perhaps due to the presence of COVID-19 a trend for diversification can be seen in this year's training delivery methods. More providers are choosing to incorporate the use of **video (40%); Quizzes (38%); content downloads (33%); podcasts (19%),** and **webinars (29%)**. Trainers are seeing the opportunities and benefits of pivoting their businesses to suit the times and their learners' needs.

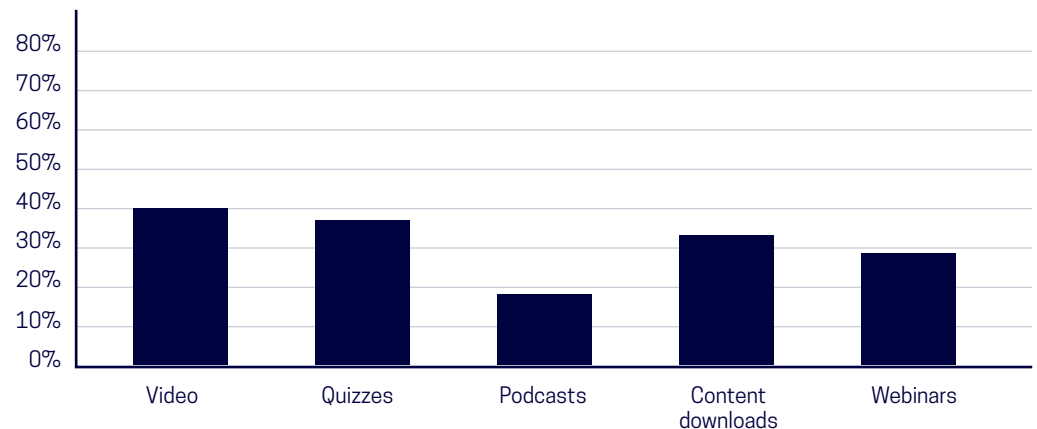
"We're doing very well, having pivoted successfully into the online world, plus regaining some face to face work now. It feels like there are lots of possibilities."

Especially when it comes to online learning, businesses are seeing the benefits of diversifying their delivery styles as a way of keeping their audience engaged.



Watch: How not to bore your online session audience

Alternative delivery methods



The Training Industry

The online transition shows a slow but steady curve upwards

Despite predictions of steep growth in online delivery services last year, the curve continues a more dignified slow and steady upward trend. Take **online self service** for instance. Last year, more than half of training providers predicted they would be operating some sort of self-service option for clients. While the amount of providers offering this service has **risen to 38% this year**, it is far from the predicted outcome. This tells us that while many providers may be looking at offering

these services in the future, the resources required to offer online programmes may take a little longer to gather for some businesses. In fact, many providers have pointed to the need for more staff and updated technology in order to be able to support online training services.

Digital diversification strikes again

It seems that the digital diversification of the COVID-19 lock-downs have stuck around and are a growing trend among training providers. As with delivery methods



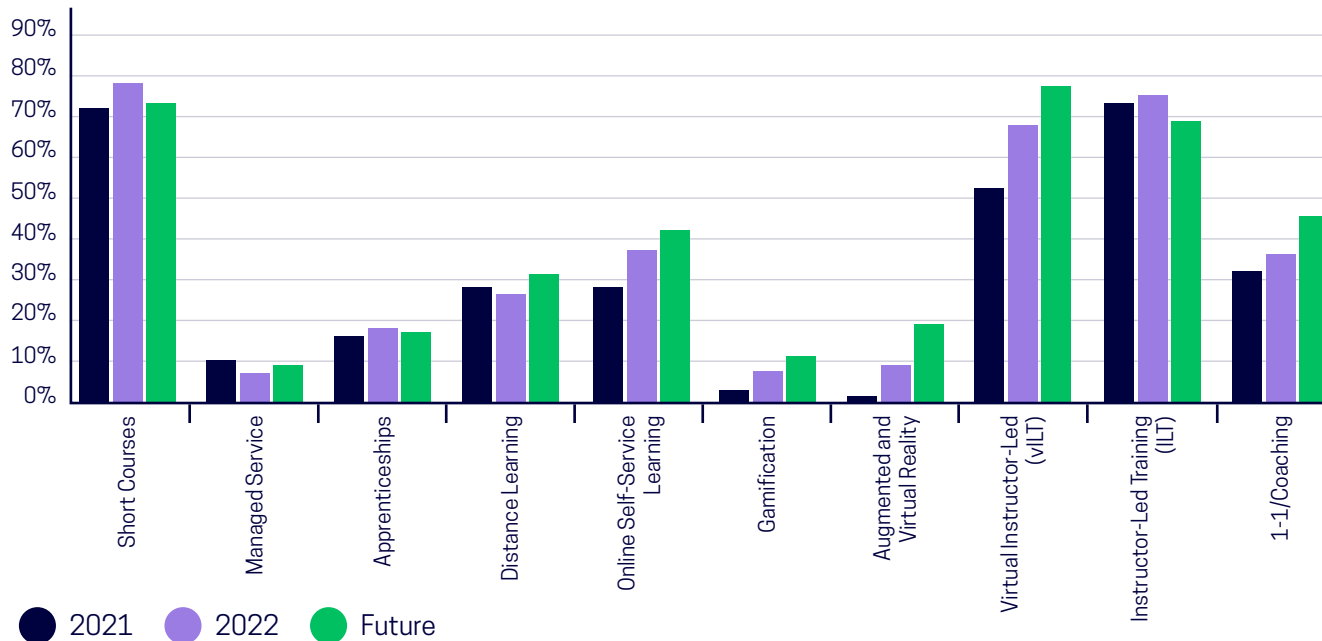
There's a huge opportunity with AR and VR training



encompassing more diverse elements in order to keep digital users engaged, service offerings are also beginning to incorporate more **gamification (9.5%)** and **virtual reality (19%)** elements.

Short Courses are still king 4 in 5 training providers now offer short courses

Although training providers this year expect they will offer less short courses and more alternatives next year (the same thing was predicted last year), we have instead seen a **6% rise**. This makes a strong case for the fortitude of short courses. While the rise of digital is inevitable, there is still a place for the more traditional types of training service.



Technology

30% are still receiving 'few' bookings online

It stands to reason that with the rise of digital training methods, that online bookings would similarly continue to rise. Online booking has become more accessible for training providers of all sizes in recent years, especially with the automation processes on offer. However, we have seen a levelling-off this year, suggesting that many companies still struggle with the complexities of taking online bookings.

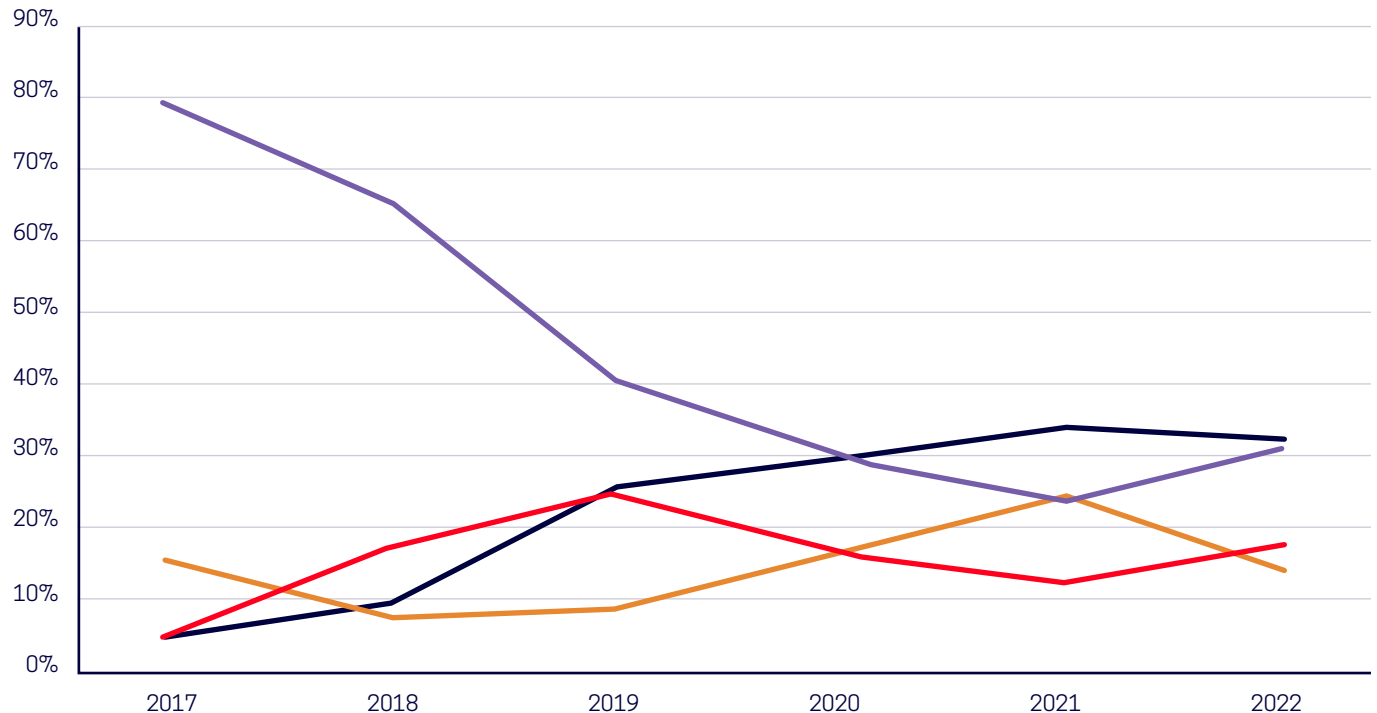


50% claim processing course bookings and enquiries is still one of their most time consuming tasks

A major reason so many providers are still not comfortable enough to offer online bookings is the time taken to process course bookings and enquiries. **50% of all survey respondents** claim that this is still one of their most time consuming tasks

Amount of online bookings made, by year

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



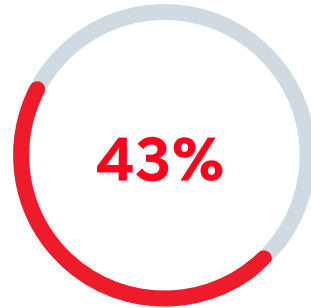
Read: The Ultimate Guide To Increasing Online Course Bookings

Technology

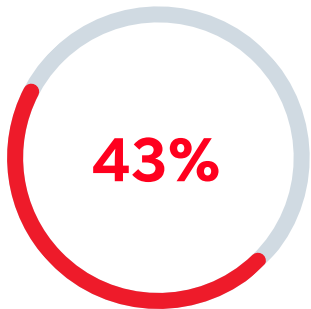
Top administrative pains for training professionals in 2022



Processing course bookings & enquiries



Course promotion



Course & event scheduling



Arranging trainers & venues



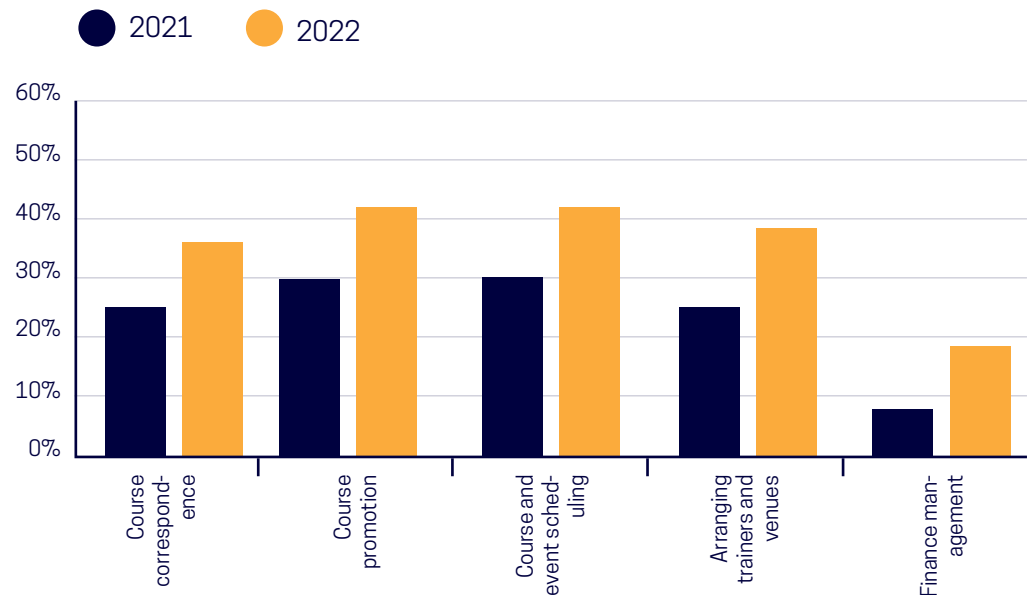
Blog Post: Course Admin Doesn't Have to Be a Drag (But Here's 8 Reasons Why It Is)

Processing course bookings and enquiries is the leading administrative pain in 2022, up 2% on last year.



It's well known that training comes with its fair share of administration. The time professionals are spending processing course bookings has risen year-on-year, and is now the biggest administrative pain alongside correspondence and scheduling. A lot of administrative tasks have seen an increase in 'pain' levels this year, so much so that it seems that training providers are really struggling to find the time and resources to throw at admin.

Top 5 administrative pains that have increased since 2021



Technology

The use of training software



81%

of training professionals believe their current training management process is effective



60%

of training providers are now using a training management system



Only 1 in 4

training businesses are using a CRM to manage customer relationships

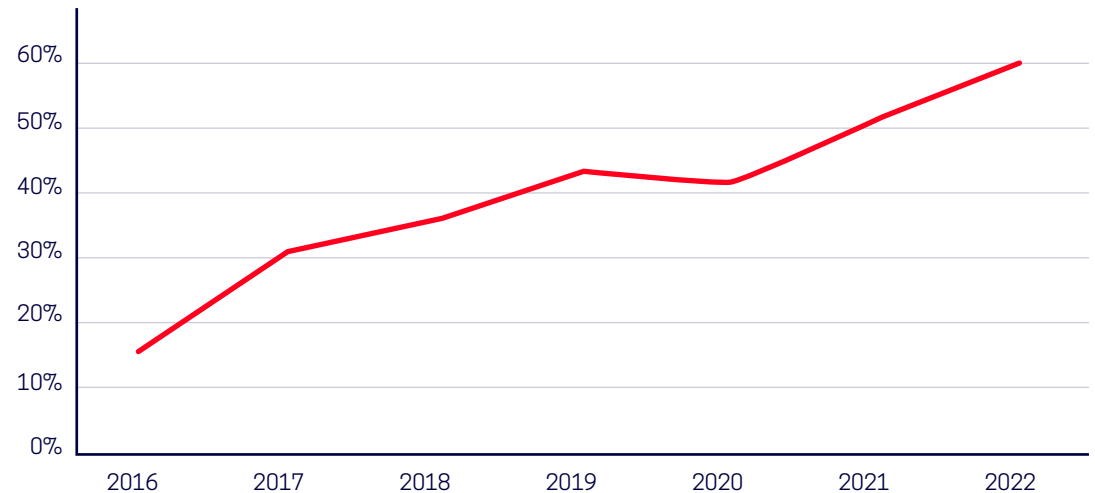


Read: The Ultimate Guide To Training Management Software

Training Management Software

It is unsurprising to find that as the number of training providers using a training management system have risen, so have the number of providers who are confident in the effectiveness of their management processes. **Training management software is now used by 60% of training providers**, up by almost **10%** on last year. Compare this with the **9% rise in confidence in management processes** (from 72% last year) and we begin to see a clear story emerging about the benefits of automating system processes using a TMS. A TMS can help manage course bookings; delegate management; course and resource management; automated communications and tasks; reporting; finance, and sales management. These platforms are often seen as an all-in-one management solution that reduces the need for disparate systems or integrations with other platforms.

Use of training management software, by year



Other software trends

One thing is clear from our data this year, and that is that training providers are looking to technology more than ever to help them manage their business. For instance, **finance tools like Quickbooks are being used by 22% more training providers this year compared to last year.**

Similarly, **Survey Monkey (+15); Moodle (+11); Email marketing software (+3)**, and **marketing platforms like Hubspot (+9)** have all increased in use this year,

Our 2020 End of Year Training Industry Report uncovered that **72% of training providers have invested in more technology during COVID-19**. For $\frac{3}{4}$ of these professionals this was in order to support their transition to online learning. It seems that this early COVID-19 investment has paid off when it comes to training providers using more technology to help manage their businesses.

The use of authoring tools and **lightweight LMS solutions** are also increasing among training providers looking to upload course material previously created for a classroom environment, having grown by another **7%** from last year.

Here are some of the most common tools training professionals are using in 2022:

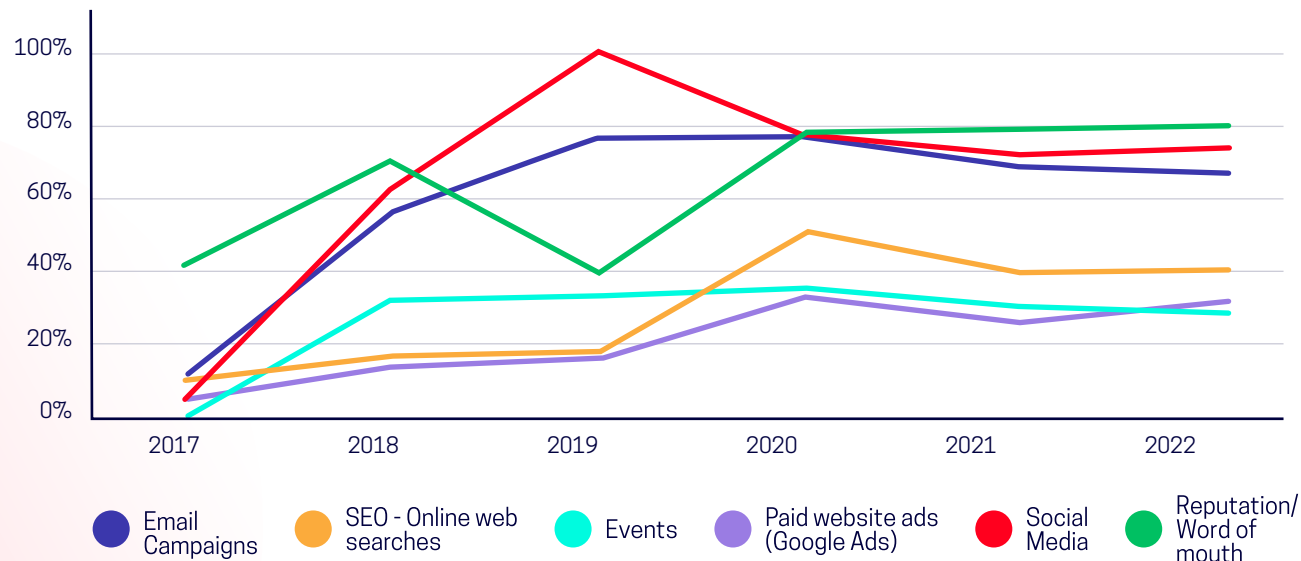
Office 365	90%
Web conferencing (e.g. Zoom)	62%
Email marketing (e.g. Mailchimp)	50%
Google Analytics	50%
Adobe Creative Cloud	17%
Survey Monkey	33%
Finance system (e.g. Quickbooks)	31%
Marketing platform (e.g. Hubspot)	26%
Google Suite	26%
Moodle	21%
Eventbrite	19%
Bespoke software	14%
SalesForce	7%
Training event specific app	7%

Sales & Marketing

In 2021 we found that squeezed budgets led to a reduction in marketing spend across most promotional methods. This year however, training providers are seeing the need for promotion more than ever. We have seen a **4% rise in paid website advertising** this year compared to last year, showing that a return to 2020 levels could occur within the next year or two.

Year-on-year we have seen the top three most popular means of promotion remain the most popular choices for training providers. These being **Social media, email campaigns and word-of-mouth**. An interesting cross-over has occurred with these three tactics since 2019 however. In 2019 training providers were beginning to rely much more heavily on digital methods and we saw a giant dip in the reliance on word-of-mouth. It seems however, that the hardships of the past two years have both increased word-of-mouth dependance, and also cemented its position as the top method for promotion. As we begin to build out of the strangeness that was marketing during a pandemic, might we see word-of-mouth once again begin to decline?

How training providers are promoting their courses, by year



Social Media

As social media marketing tactics continue to remain one of the top choices among training providers, so too does the use of **LinkedIn** as the major channel for promotion. This year almost **90% of training providers reported utilising LinkedIn** as a means of promoting their business.

LinkedIn was once mostly dominated by recruiters and job seekers. Now however, it is the highest used channel in the training industry. And, if you think about it- Gaining clients through LinkedIn recommendations and connections is much the same as word-of-mouth. In fact there is most likely a crossover in responses by trainers gaining word-of-mouth clients via LinkedIn.

Facebook and Twitter come in at a not-so-close second, with **55%** of training providers marketing through Facebook and **45%** utilising Twitter. **YouTube and Instagram** feature slightly further down our list, but are certainly trending higher than last year. Last year only one in four companies utilised these services, whereas now almost one third of training businesses use either or both of these channels. Again, this points to a general desire for both technological and marketing diversification within the industry this year.



Read: A 5 Step Plan To Growing Your Training Business Using LinkedIn

Sales & Marketing

Keeping up to date with industry trends



+33%

Social Media

Social media is the top-champ for growth this year. With **4 out of 5** respondents using LinkedIn for industry news, as well as a 9% and 13% growth in the use of Facebook and Twitter respectively, it is clear that social media continues to be the most efficient and reliable way to get the latest training industry news.



+10%

TrainingIndustry.com

There's a host of great online resource centres for training professionals, updated daily with fresh content on everything L&D. The most favoured site by far by our respondents this year is **trainingindustry.com**. Copping a **10% rise**, while other popular online resources have shown slightly decreasing readerships.



-9%

Webinars

This is merely conjecture, but perhaps we're all just a little bit fed-up with online learning this year? Training providers seem to think so anyway, with a 9% drop from last year in providers who get their information from webinars. Even so, **2 out of 5 respondents** still watch **webinars** as a means of getting information, so not all hope is lost for the humble webinar... maybe we're just on a break.



-1%

Events & conferences

Last year, **events and conferences dropped by a shocking 15%** due in most part to social distancing measures. This year, it seems that the dip of last year has **bottomed out at 55%** with only a **1% drop** in providers utilising events as an information gathering source this year. This may not be the full story however. As many networking events and conferences have taken place online in the past two years, it is quite possible that the 55% still attending these events are actually online.

Measuring success



76% see customer satisfaction as the biggest metric for success




60% use repeat business as a measure of success



40% use course attendance, profitability and completion as measures of success

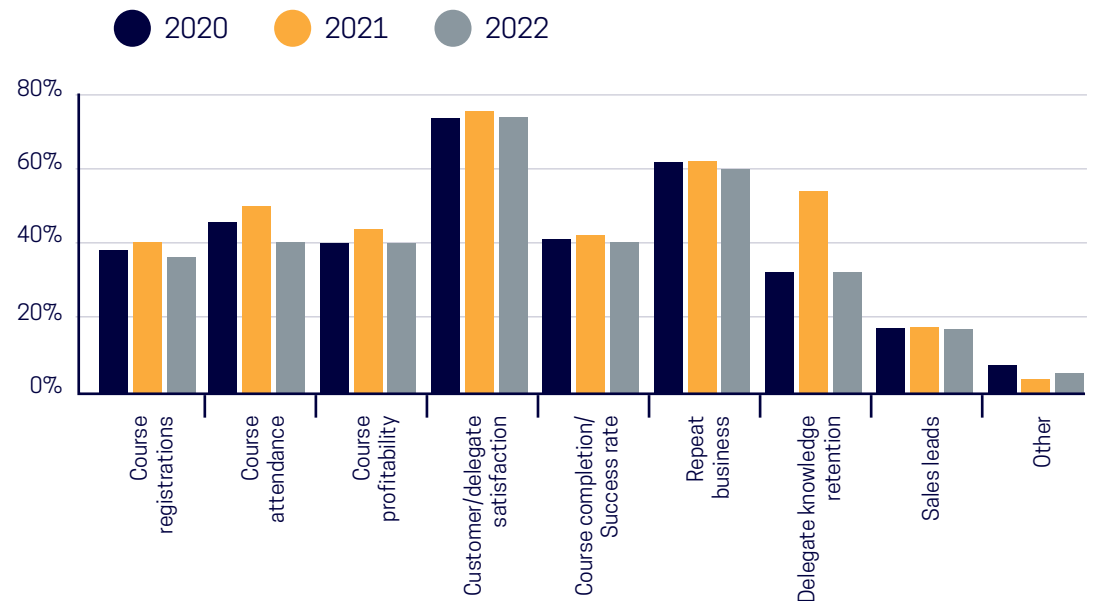
Year-on-year we see the same winners when it comes to measuring success in the industry. **Customer & delegate satisfaction** continues to be the preferred measure of success by **76% of training providers** to inform how well they are performing. It is a metric that is very much dependent on the feedback of clients (see next page). It is therefore of the utmost importance that feedback is collected effectively.

 **Read: 10 KPIs to track for commercial training success**

Interestingly, there has been minimal deviation from the last two

year's figures – We have seen however, that **course attendance has become less important this year**, levelling out with the likes of profitability and completion rates. This is perhaps indicative of a change of priorities over the lock-down periods of the last two years, and the switch to more digital offerings for many businesses.

The metrics used to measure success: 2020 – 2022



Measuring success

The collection of feedback via paper forms, by year



69%	2016	40%	2019
53%	2017	36%	2020
60%	2018	28%	2021

10%
2022

The number of **training providers using paper feedback forms** has continued to fall in 2022. As electronic methods of collection become increasingly popular the paper form has almost disappeared. **Less than 10% of training providers now rely on paper 'happy sheets', down 60% from 2016.**

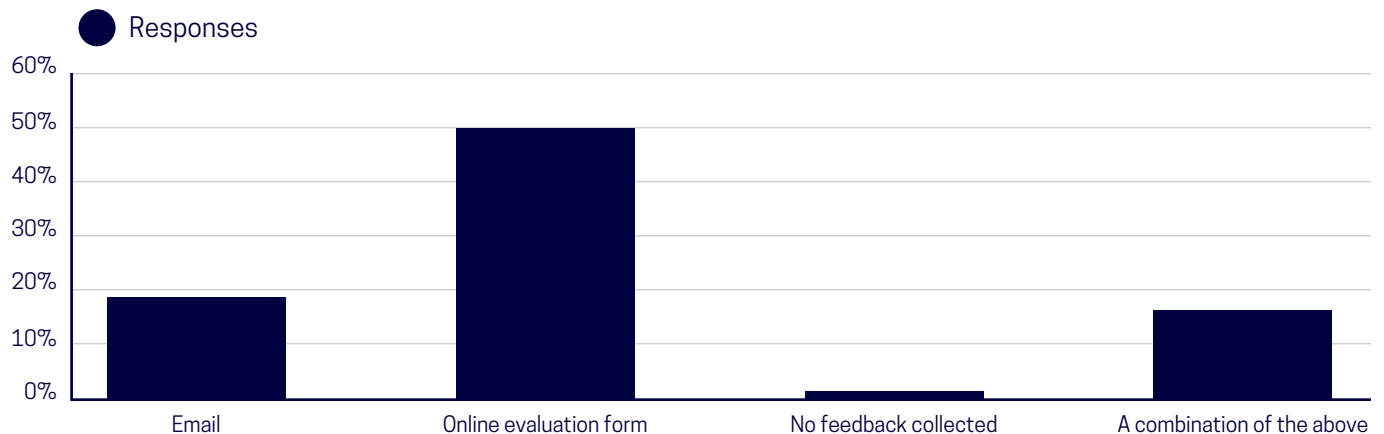
 **Download:** The Ultimate Guide To Training Surveys

The **increase in digital training delivery** over the past few years has sped up the transition to online survey tools, with the likes of SurveyMonkey and built-in LMS tools proving popular among providers.

The **use of email** has increased this year by almost **10%** and **50% of training professionals now use an online evaluation form**. There are many reasons why providers are choosing digital over paper surveys

- It's time consuming to manually input data from a paper form
- There are lots of cheap or free tools to choose from that can automate the process
- Learners aren't always comfortable offering honest feedback when the trainer is still in the room
- It's bad for the environment!

Other methods training providers use to collect feedback in 2022



Biggest challenges for training providers in 2022

There are several challenges facing the training community this year, vying for top position. **Increased competition** is a much bigger concern this year for training businesses, with **36%** of respondents marking it as one of their biggest challenges. The drive across industries for a re-skilling of the workforce during COVID-19 lock-downs (McKinsey, 2020) has led to many providers pivoting to online offerings and therefore a more competitive market.

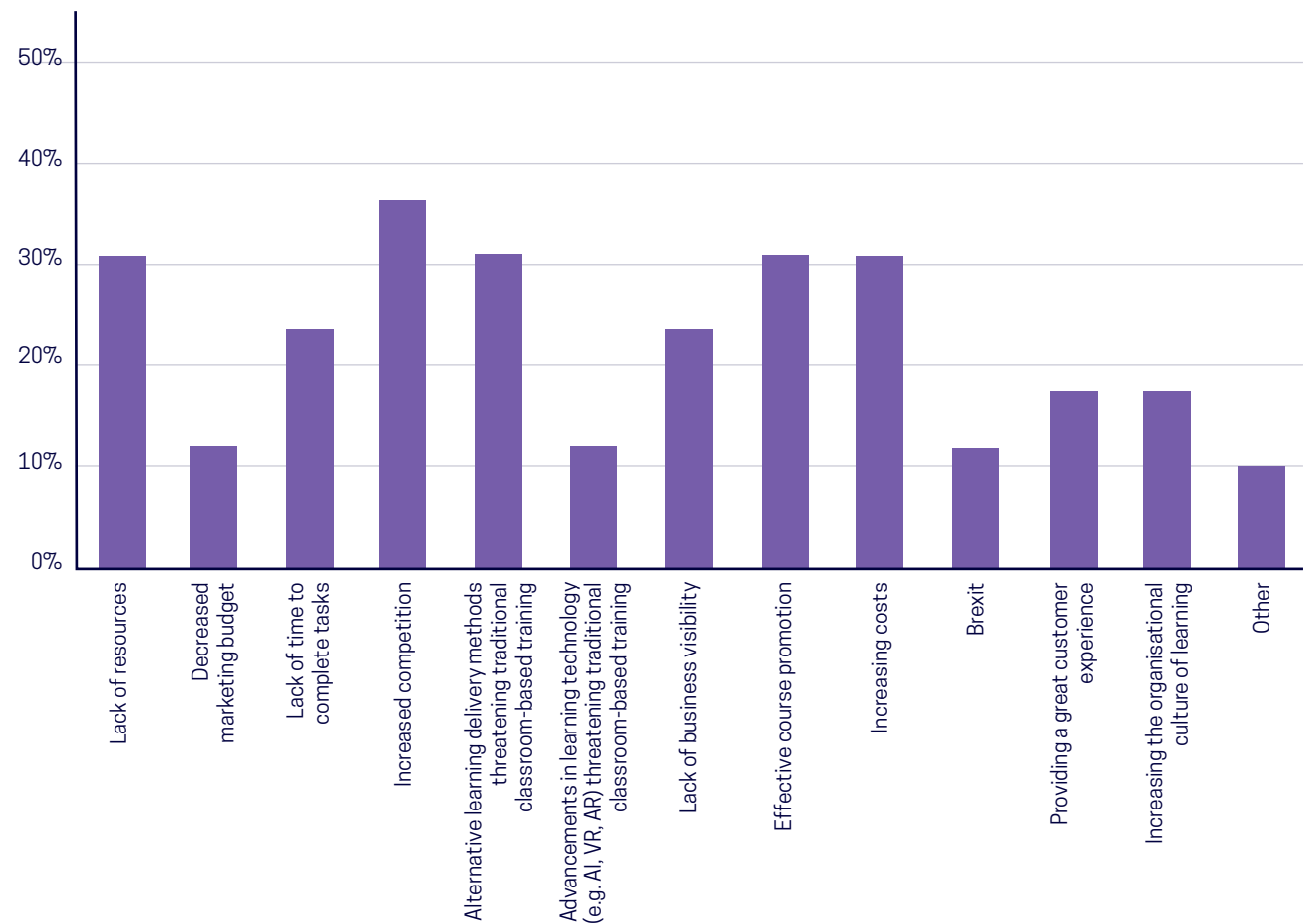
Alternative learning delivery methods threatening traditional classroom training has once again been highlighted as a big issue for training providers. This very much reflects the sentiment above. Necessity is driving more providers online, which threatens to leave less technically savvy providers in the dust.

These concerns are understandable, when we consider that delegates could be apprehensive about returning to mix with other delegates, and may favour the cheaper (and less expensive to administer) methods of online delivery.

Other noteworthy comments from respondents included the unpredictability of training's return to the classroom post COVID-19, as well as fears over the economy due to the myriad of global issues we are facing.

“
unpredictability
around how much
training will return
to face-to-face
”

The biggest challenges training providers face in 2022



Biggest opportunities for training providers in 2022

Interestingly, despite alternative delivery methods being seen as one of the biggest challenge for providers, this year's biggest opportunity by a mile is the **increase in popularity of online learning (67%)**, closely followed by **digital innovation (40%)**. It seems that online learning and delivery methods are a mixed blessing for many providers. There are plenty of opportunities available for training businesses that are willing to take on the challenge of new delivery methods. COVID-19 forced many hands in the industry, to the benefit of most, it would seem.

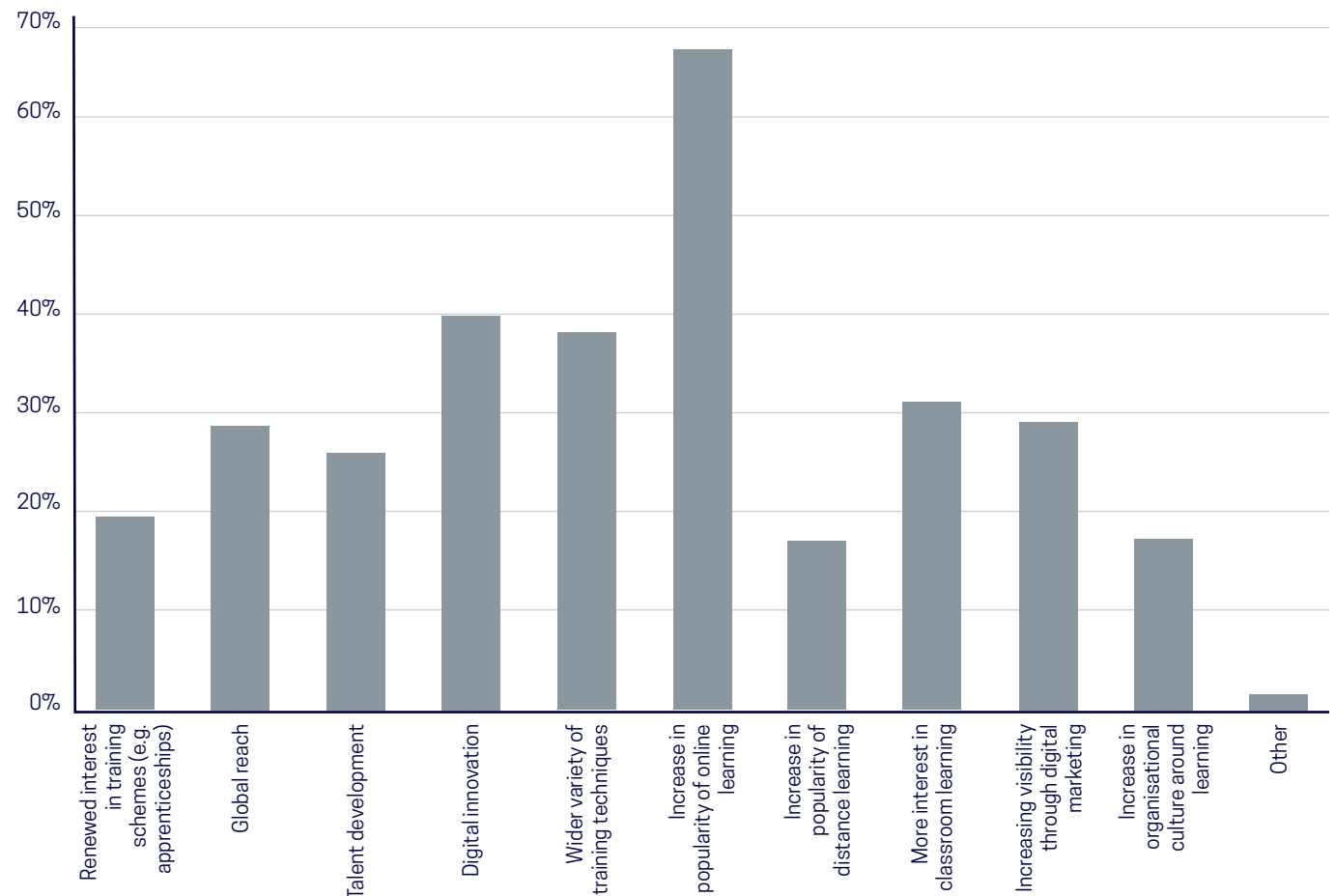


It's going to be a great year. The pandemic has forced us to do what we always planned to do - seize the global market by developing distance and online learning opportunities



15% more training providers feel that **global reach** is a bigger opportunity this year. Many providers have been investing in technology over the past two years, so it's no surprise that the ability to reach a global audience is seen as a closer goal and bigger opportunity this year.

The biggest opportunities for training providers in 2022



Training business outlook

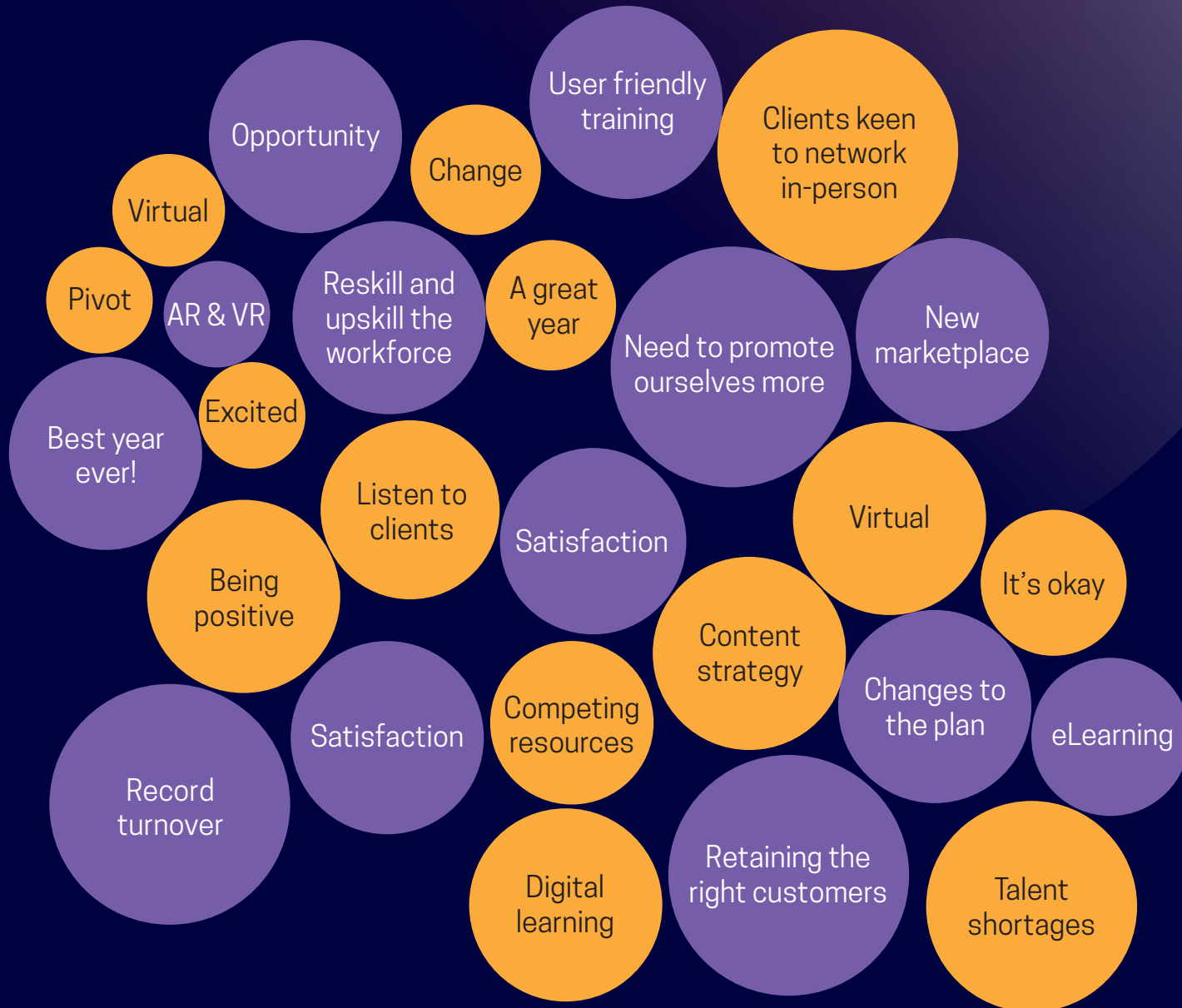
Training professionals were asked to rate the outlook for their training business and L&D programmes for the year ahead on a scale of 1-10, 1 being 'No future', 5 'Similar to last year' and 10 'Rapid growth/increased profits'. We then calculated a weighted average.

Last year we thought we had recorded the biggest confidence score that we were going to get (6.51) but it has been once again surpassed this year, proving that training provider confidence and hope for the future is at an all time high.

6.8
out of 10
(2022)

6.51
out of 10
(2021)

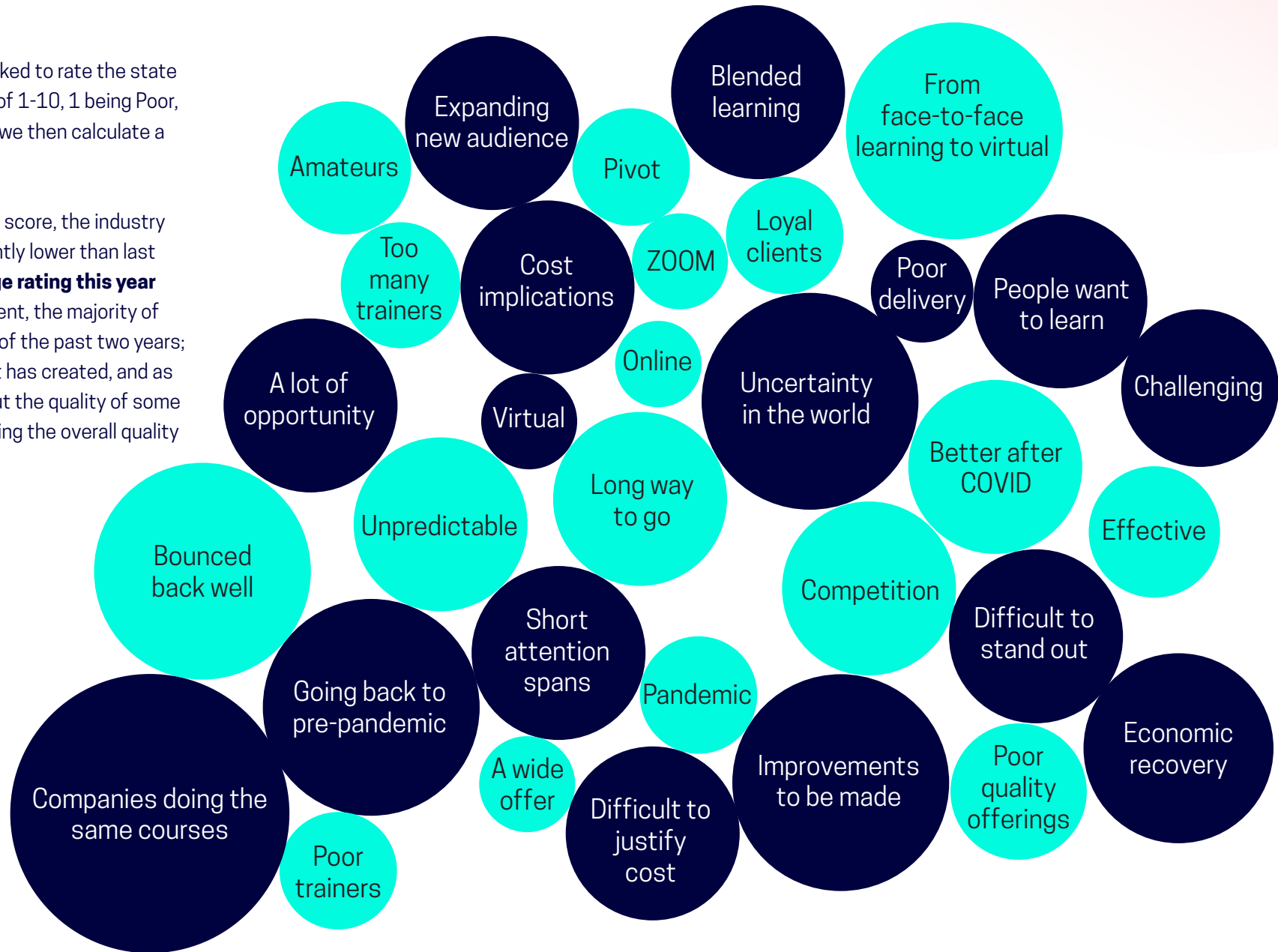
There's a continued excitement and energy among training professionals this year, many seeing the opportunities in learning and development, as well as digital and distance learning. Many have already pivoted during COVID-19 and are looking forward to a successful next few years in the industry.



The training industry outlook

Training professionals were also asked to rate the state of the training industry, on a scale of 1-10, 1 being Poor, 5 Challenging and 10 Great, where we then calculate a weighted average.

Similar to the business confidence score, the industry outlook is promising, although slightly lower than last year's average of 6.54. **The average rating this year is 6.33/10.** When asked for comment, the majority of sentiment related to the upheaval of the past two years; the challenges and opportunities it has created, and as we see most years, a concern about the quality of some training providers' offerings affecting the overall quality of the industry.



The Learner Report

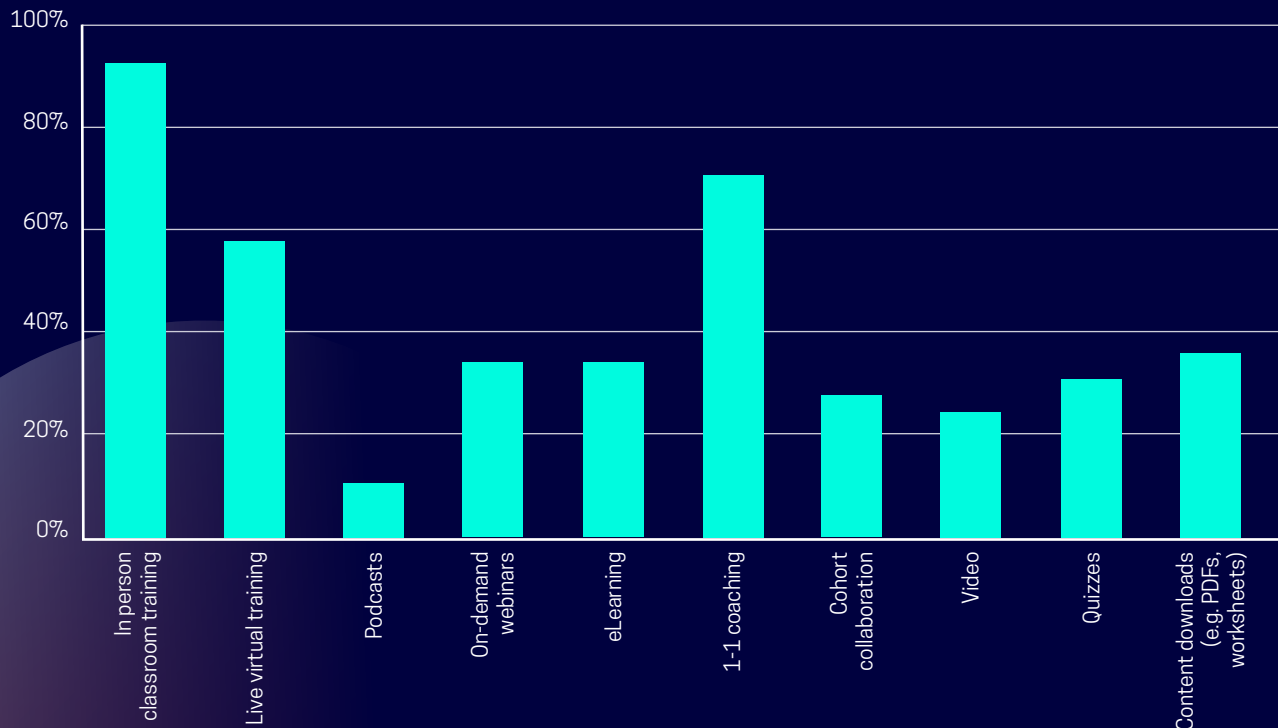
Learners want in-person training

We asked learners which training delivery methods worked best for them. Not surprisingly, the top three preferences were **in-person training (91%)**, **1-1 coaching (70%)**, and **live virtual training (58%)**. All three share the element of learning from/with another human- proving that some form of human contact is important for learners.

Learners are using search engines

When asked about their preferences for finding courses, learners showed an outstanding preference for **online search engines** over other means, such as referrals from colleagues or accrediting bodies. If we compare learners' preferences for using **social media** to find courses, to **search engine use**, the difference is from **3%** to **47%** respectively. Least popular is social media, even though this is the biggest focus from training provider results.

Preferred training delivery methods for learners in 2022



If we compare this to the amount of training providers using **Google (31%)** compared to **social media (71%)**, we can see that there is a massive disconnect, and potentially a quick win for companies willing to invest in Google advertising.

What learners think about digital

Overall, **100% of the learners** surveyed were between somewhat positive and extremely positive about the **impacts of technological advancements** in the industry. This is an interesting comparison with the level of learners that prefer face-to-face training, but not entirely contrary. Technological advancements and digital transition does not necessarily mean the death of face-to-face. In fact, the two compliment each other very well, especially if we consider the use of Zoom for training during the pandemic.

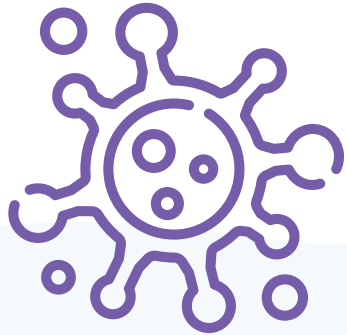
“

With VR becoming increasingly popular it is allowing classes to become virtual. For someone like me who likes to study in a room this would allow to be trained from anywhere in the world

”

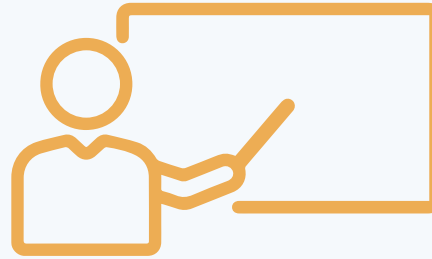
Conclusion

So, what have we learnt?



The impact of COVID-19

COVID-19 has had a positive effect on many training businesses because of the time given to up-skilling and re-skilling workforces across many different sectors. However, the uncertainty of face-to-face availability has had a negative impact for some training businesses, especially those with less ability to pivot into digital and distance offerings.



Learners and Training providers want the same thing

Face-to-face, human interaction. Whether it be an in-house course; an open course, or a live Zoom class, it is clear that both trainers and learners prefer interaction with other people. This is in part due to the COVID-19 restrictions making us all crave a little more interaction, but is also a basic human requirement. One that makes learning easier and more enjoyable for all of us.



Time to change our marketing tactics?

One very interesting outcome from surveying learners has revealed a disconnect with how delegates are finding courses and how training providers are advertising them. It is perhaps time to redirect some funds from social media into search engine advertising; SEO, and inbound marketing tactics.

About accessplanit

At accessplanit, training is in our DNA. We know running a training business is tough. We know software and implementation is hard. It's not something you do every day.

Our team of experts use their knowledge of working with hundreds of training companies to deliver the tools and support you need to achieve the results you want.

- Automate repetitive tasks and processes to make time for managing what matters.
- Your entire training operation managed in one central platform.
- Training management made easy with our mix and match modules.
- Supporting our customers at every step of their journey.



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