



3rd Qtr. 2011 IT Training Survey

3rd Quarter 2011

Phil Garvey, CEO
ITS Feda Limited— Guildford, UK
T: 0870 145 1600 E: enquiries@itsgroup.org.uk

Executive Summary

I am delighted to present the results of our latest survey into the UK IT Training sector. In summary, while expenditure is restricted across all sectors, there is still a strong demand for IT training covering the broad spectrum of the IT market. Office 2010 continues to generate high demand for end user training. The move from earlier versions to 2010 is now recognised as too big a difference for end users to transition without a formal training plan. The same can be said for the other "2010" offerings such as Visio and Project.

For the IT professional the need to gain and maintain accreditations is even more important as the market becomes flooded with experienced professionals hitting the market as result of redundancy. Virtualisation including VmWare and Hyper V are showing exceptionally strong demand. Although Apple professional volumes are low there is an increasing demand for Apple / Microsoft co-existence educational offerings.

While the market for classroom training remains the largest sector by volume, requests for specific onsite training in both the Educational and Commercial sectors continues to grow. We believe this is driven by the need to keep travel and accomodation costs to a minimum while having the ability to tailor content to specific requirements.

Finally, my thanks to all the participants who took the time to complete the survey and to our loyal customers who have volunteered additional comments and feedback.

Phil Garvey

A handwritten signature in blue ink that reads "Phil Garvey".

CEO

ITS Feda Ltd

"The UK's Fastest Growing Training Provider"



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Achieving Accreditations

Finding a magic formula for passing exams and gaining accreditations is an impossible task. In our capacity as an official testing centre, we have managed to gain some insight into successful techniques. This part of the survey is by no means conclusive but does provide some recommendations. The majority of the results were based around Microsoft accreditations such as MCITP

The Microsoft Certified IT Professional (MCITP) certification helps validate that an individual has the comprehensive set of skills necessary to perform a particular job role, such as database administrator or enterprise messaging administrator. MCITP certifications build on the technical proficiency measured in the Microsoft Certified Technology Specialist (MCTS) certifications. A student earns one or more MCTS certifications on his way to earning an MCITP certification.

Preparation Routes

Self Taught

Due to pressures on time and ever increasingly on training budgets, many students are self-taught using a variety of material. Even the most experienced practitioners seem to have great difficulty in simply turning up and passing an exam. As with driving a car, there is a way to pass a test which is somewhat isolated one's ability to drive a vehicle. Our results show that experienced practitioners who take the time to learn using official online training such as [example course](#) have a good success rate. Non-experienced practitioners generally fail using this method.



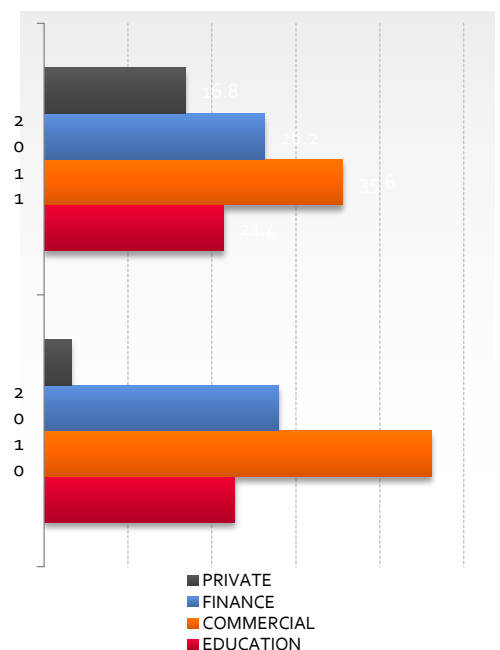
Condensed

There has been a rapid growth in "boot-camps" or "accelerated learning". The statistics from our centre show that these candidates have the highest failure rate. While it is difficult to understand the reasons behind this, logic states that as the exams and accreditations become harder there is no substitute for proper official training courses with the right time between courses for revision and practice.

ROUTES TO SUCCESS

- ▲ USE OFFICIAL PROVIDERS
- ▲ DO YOUR HOMEWORK
- ▲ USE CLASSROOMS IF POSSIBLE
- ▲ DO NOT GIVE UP!

Responses by Industry Sector



Non Official

In any market there are always “official” and “non official” providers. All the major technology providers including Microsoft, Oracle, VmWare, Sun have official Learning Partners—look for the logo!



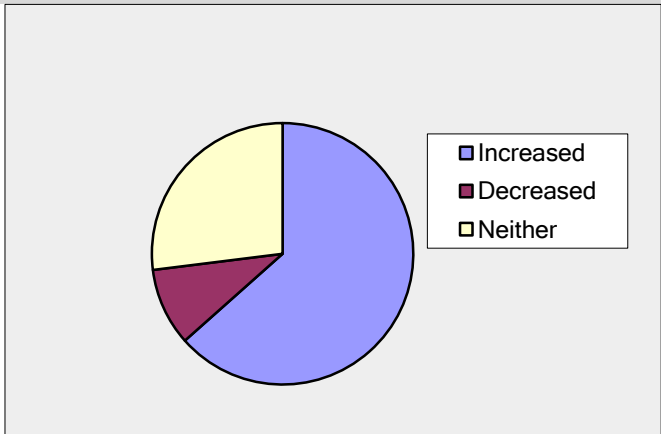
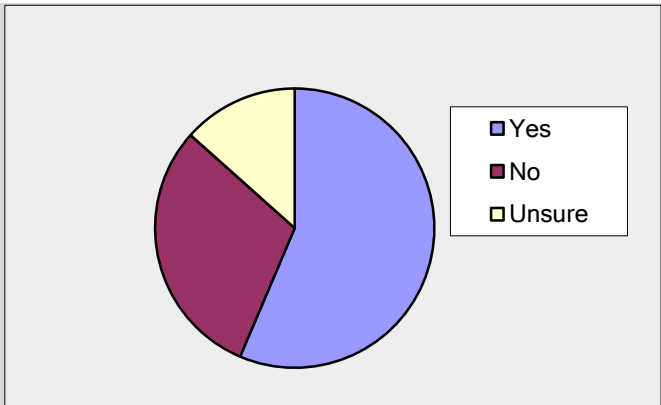
Official

Whether you want to learn a new technology, prepare for Certification, start a new career in IT, or improve your marketability, Official Learning Partners are best placed to help you achieve your training goals. If you need training on technologies, always look for the official Learning Partner logo. Official Partners with a Learning competency are:

- **Credible, valuable, trustworthy**—Technology providers require that their Learning partners demonstrate their expertise as leading providers of comprehensive learning solutions on their technologies, resulting in customer satisfaction among individuals and companies that use them for training.
- **First to market with the latest approved course materials**—Official Learning Partners provide the most comprehensive selection of learning solutions across the technology spectrum.
- **Breadth of solutions**—Official Learning Partners offer a breadth of solutions to suit your training needs, from classroom training to distance learning.

The combination of Official Courses, delivered by premier technical and instructional specialists, will lead you to a successful training delivery.

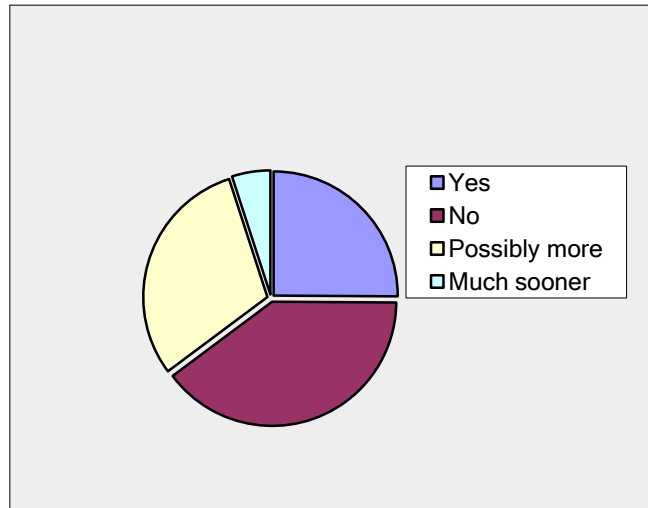
Survey Question Results

No.	Description	Chart								
1	<p>Q.1 Do you think the need for IT training has increased or decreased in the last 12 months?</p> <table border="1"> <thead> <tr> <th>Answer Options</th> <th>Response Per cent</th> </tr> </thead> <tbody> <tr> <td>Increased</td> <td>63.5%</td> </tr> <tr> <td>Decreased</td> <td>9.6%</td> </tr> <tr> <td>Neither</td> <td>27.0%</td> </tr> </tbody> </table>	Answer Options	Response Per cent	Increased	63.5%	Decreased	9.6%	Neither	27.0%	
Answer Options	Response Per cent									
Increased	63.5%									
Decreased	9.6%									
Neither	27.0%									
	<p>Further investigation with the respondents quoted increasing complexity of technology, new products from suppliers, the need for efficiency and the need for accreditations as the main reasons for increased demand.</p>									
2	<p>Q.2 Do you think software products are becoming more intuitive?</p> <table border="1"> <thead> <tr> <th>Answer Options</th> <th>Response Per cent</th> </tr> </thead> <tbody> <tr> <td>Yes</td> <td>56.4%</td> </tr> <tr> <td>No</td> <td>30.2%</td> </tr> <tr> <td>Unsure</td> <td>13.4%</td> </tr> </tbody> </table>	Answer Options	Response Per cent	Yes	56.4%	No	30.2%	Unsure	13.4%	
Answer Options	Response Per cent									
Yes	56.4%									
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	<p>Further discussions lead to conclusions that there is becoming more commonality between the user interfaces of applications - particularly those delivered via a web interface. From an end user point of view, this makes life easier. For the IT Professional the latest versions of the products try to automate some of the more complicated tasks. While regarded as generally a good thing, this automation has generated the need for troubleshooting skills.</p>									

3

Do you think that online training will replace classroom-based training over the next 5 years?

Answer Options	Response Per cent
Yes	25.1%
No	39.7%
Possibly more	30.2%
Much sooner	5.0%

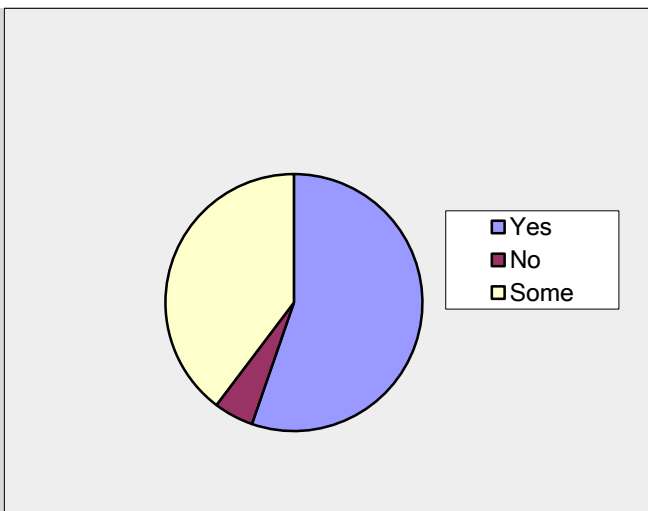


There was a huge variation in the responses. One of the factors is that online training is still in its infancy. Many students shy away preferring a more instructor lead approach. Those that had experience of using online solutions tended to like the freedom it provides in terms of content and freedom to pace oneself. There is considerable end user confusion between online training delivered as complete content and Web based training where a user “joins” a lesson over the internet run by an instructor.

4

Has the efficiency or quality of work increased upon the return of your staff or co-workers from a training course?

Answer Options	Response Per cent
Yes	55.3%
No	5.0%
Some	39.7%



Once again further investigation confirmed basic fundamentals. Where a course is marketed correctly, the trainer and the content are relevant then the business benefit is undeniable. Where short cuts are taken in terms of planning, quality or delivery then the business benefit realisation is correspondingly altered.

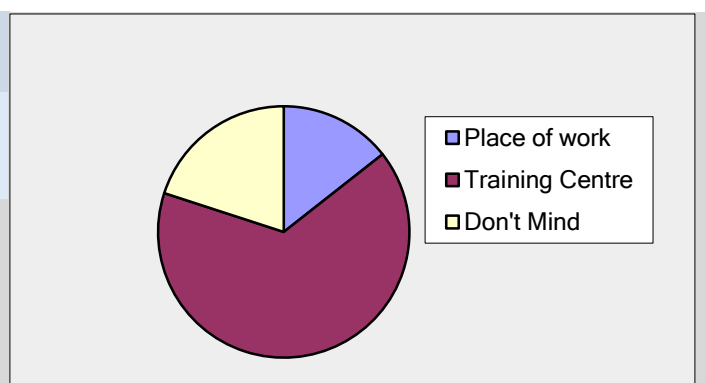
5 What type of courses would make you more efficient? i.e. Personal development, Microsoft technology, Application specific, Technology certification

The response to this question was allowed in a free format. The results contain high responses for the following categories

- Certification
- Personal Development
- Business Analysis and Workflow
- Virtualisation and "Cloud Computing"
- Project Management including intermediate and advanced Microsoft Project
- There were many application specific responses too numerous to list but in the general categories of
 - ERP (Enterprise Resource Planning – Especially SAP)
 - Finance
 - CRM
- By far the largest category was in the area of Office 2010
 - Becoming more efficient
 - New user interface
 - New features
 - Undoing mistakes
- ITIL
- Security Certification

6 Do you think training is more productive in your place of work or at training centre?

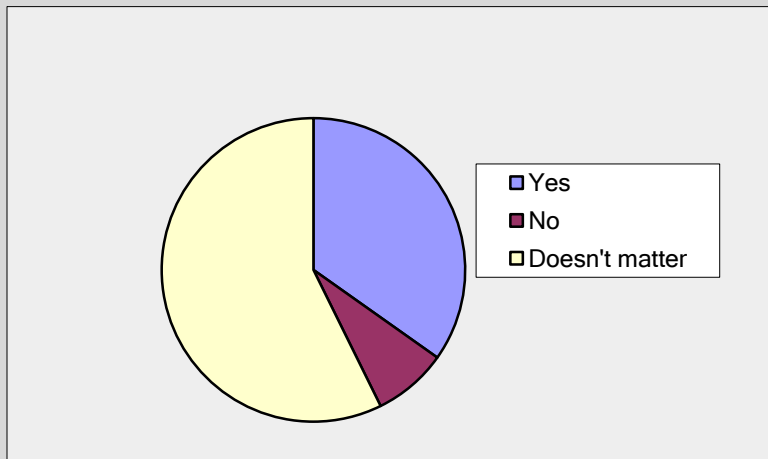
Answer Options	Response Per cent
Place of work	14.4%
Training Centre	65.6%
Don't Mind	20.0%



Many students seem to regard training as part of their "reward" package. As such a period out of the office is seen as beneficial. Budget holders had differing views mainly trying to minimise travel and hotel costs by hosting courses onsite. The facilities available in offices and geographical considerations play a major part in an organisations strategy in this area. The educational market in terms of Universities and HE Colleges show a distinct preference for Onsite "Accademies".

7 Is a relaxing countryside location more conducive to learning than one in a city?

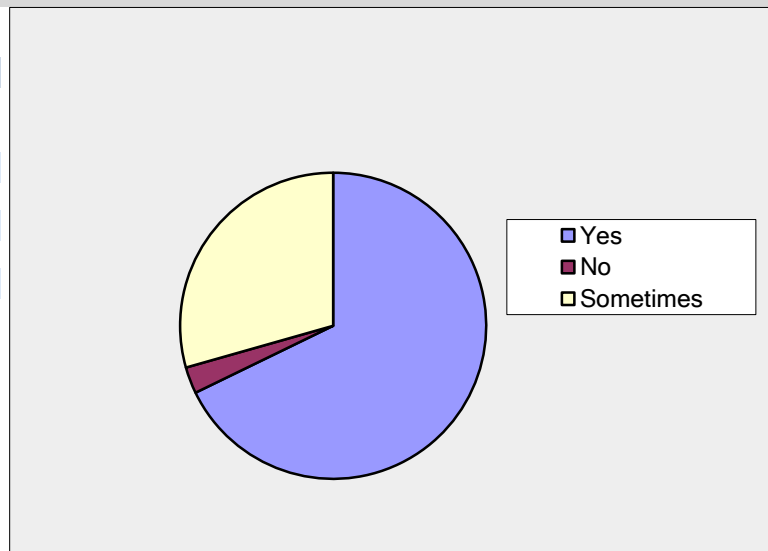
Answer Options	Response Per cent
Yes	34.8%
No	7.9%
Doesn't matter	57.3%



In general, as long as the facilities meet the required standards geographical location isn't the most important factor. Ample free parking is considered very important as well as proximity to public transport.

8 Do you think there is a business case to justify training costs in your organisation?

Answer Options	Response Per cent
Yes	67.8%
No	2.8%
Sometimes	29.4%



The economic downturn has undoubtedly played a significant part in the way organisers must now justify all expenditure. With people costs still representing a major cost line in every organisation, then training for efficiency and productivity would seem to be even more important in these troubled times. The general consensus is that making existing employees 10% - 15% more efficient is less costly than employing additional staff.

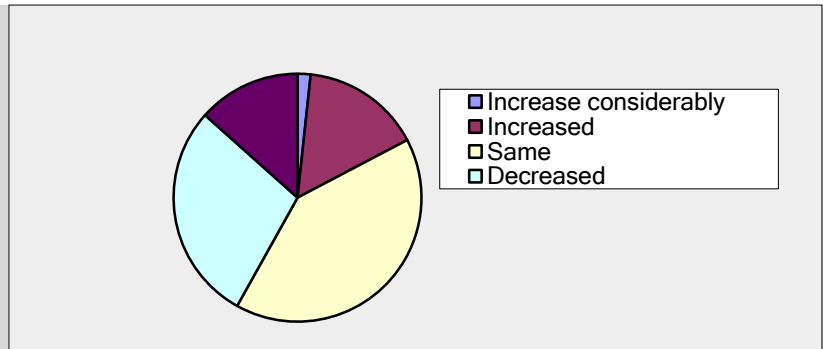
9 What can be done to maximise the return on your training investment?

This question allows free text answers. The survey questions have been supplemented with additional input from our existing customers. The top answers were as follows:

- Training allows lower banded people to take on the work of higher grade staff
- Putting knowledge to practical use as soon as possible
- Relevancy of courses at both skill and content level occurred throughout the responses
- The quality of course material and instructors is key
- The use of real life examples in training
- Ensuring training objectives are related to business goals
- Onsite follow up after training – for example a trainer “walking around users” 2 weeks after a course

10 Has your training spend changed over the last 12 months?

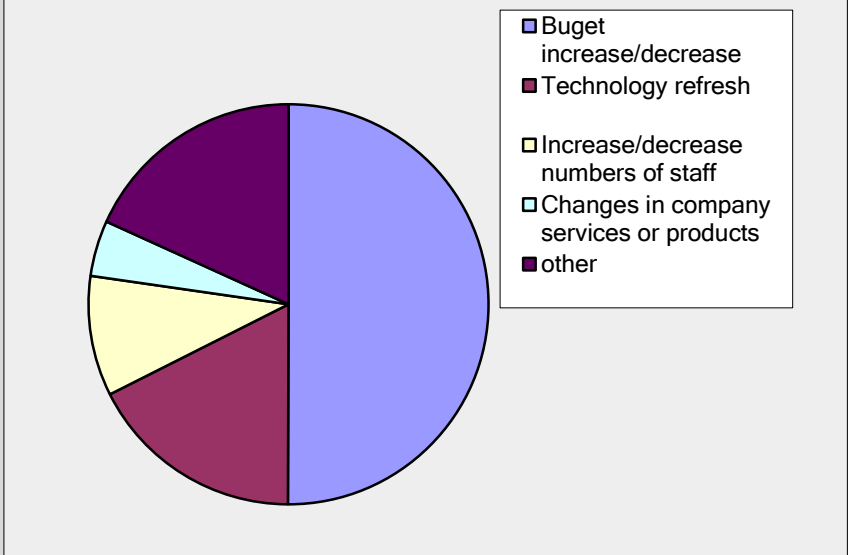
Answer Options	Response Per cent
Increase considerably	1.7%
Increased	15.6%
Same	40.8%
Decreased	28.5%
Decreased considerably	13.4%



There was no correlation between industry sector and expenditure. It seems some companies see training and staff development as more important in difficult times while others simply slash budgets across the board.

11 Why has your training investment changed?

Answer Options	Response Per cent
Budget increase/decrease	50.0%
Technology refresh	17.5%
Increase/decrease numbers of staff	9.7%
Changes in company services or products	4.5%
other	18.2%
Other (please specify)	

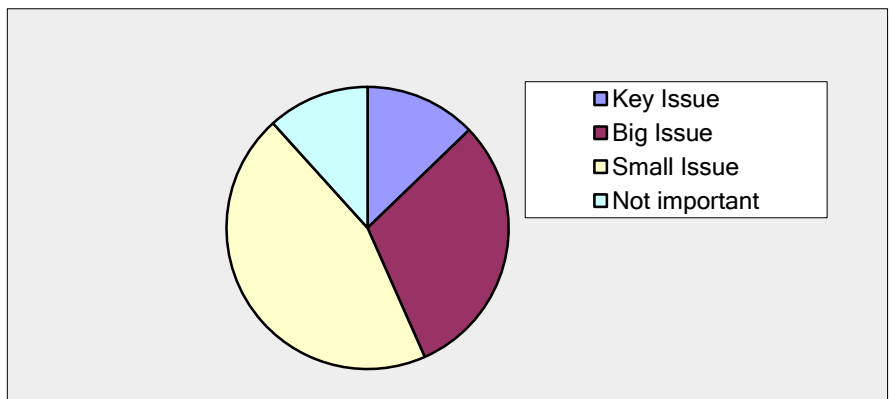


Among the highest responses under other were:

- New technology
- Pressure on budgets
- Need to be more efficient
- Lack of suitable training offerings

12 How big an issue is travelling to a training site?

Answer Options	Response Per cent
Key Issue	12.8%
Big Issue	30.6%
Small Issue	45.0%
Not important	11.7%



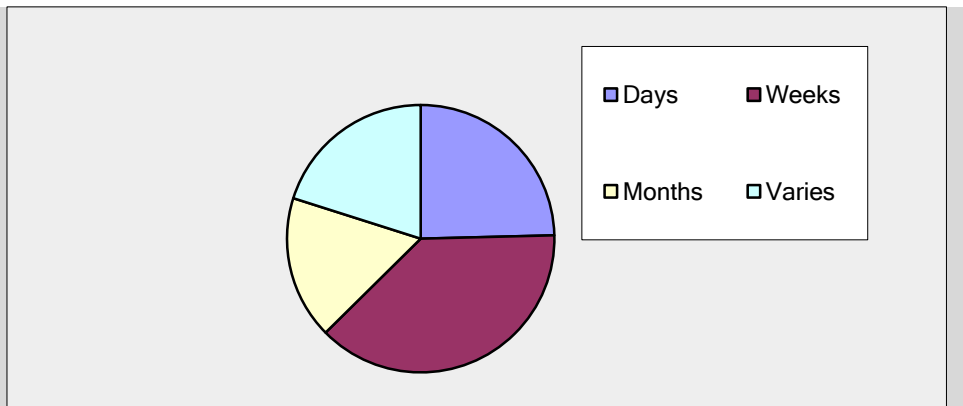
Major discrepancies were noticed depending on the location of the respondent. In general those located in the South East and London did not see an issue. Organisations in areas with large geographies saw this as much more important.

13 Would more frequent course dates make you more inclined to use external training providers.

Answer Options	Response Per cent
Yes	57.1%
No	42.9%

14 How long does it take to get approval from management/finance departments for training?

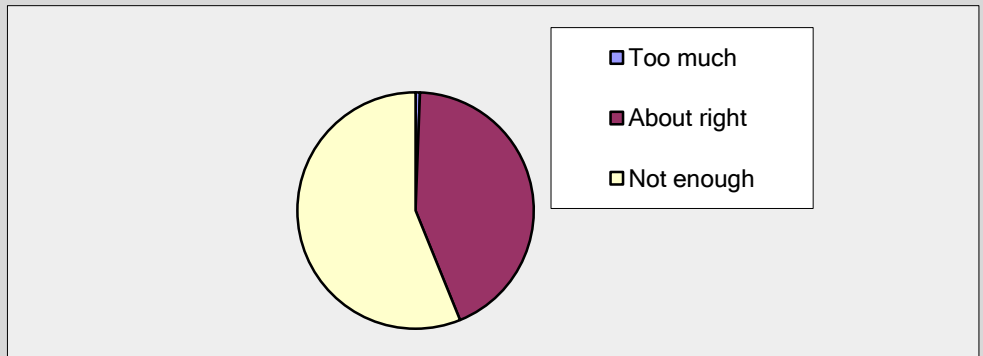
Answer Options	Response Per cent
Days	24.6%
Weeks	38.0%
Months	17.3%
Varies	20.1%



Interestingly SME's do not seem to be able to authorise training any quicker than large organisations.

15 Do you think your organisation spends the right amount of money on training?

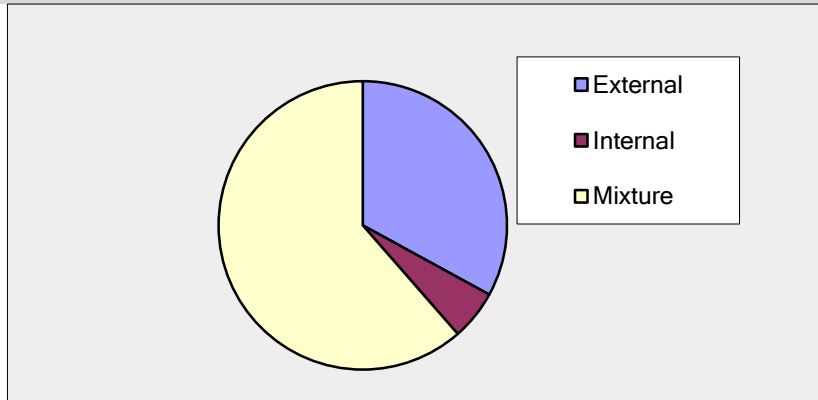
Answer Options	Response Per cent
Too much	0.6%
About right	43.3%
Not enough	56.2%



As a training provider it is difficult to be unbiased however there does seem to be a real divide in those organisations in all sectors who embrace staff development and those that do not. Those organisations that do embrace training see to set realistic budgets given the difficult economic climate.

16 Is it better to have external training providers or internal?

Answer Options	Response Per cent
External	33.0%
Internal	5.6%
Mixture	61.5%



High on the list for why:

- Training requires specialist skills in both content and presentation
- The big investment is the delegates time. Do not cut costs on the trainer
- External providers provide a fresh insight in to the use of the technology
- Some products require a large amount of in house expertise
- Lack of internal skills

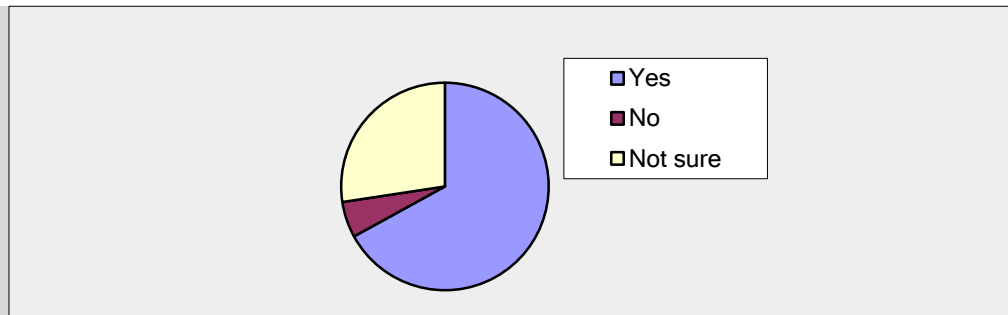
17 What is the biggest issue with external training providers?

The highest occurring reasons were:

- Expense
- Quality
- Quality versus price

18 With the rapid changes in technology, is retraining your existing staff more cost effective than recruiting new staff?

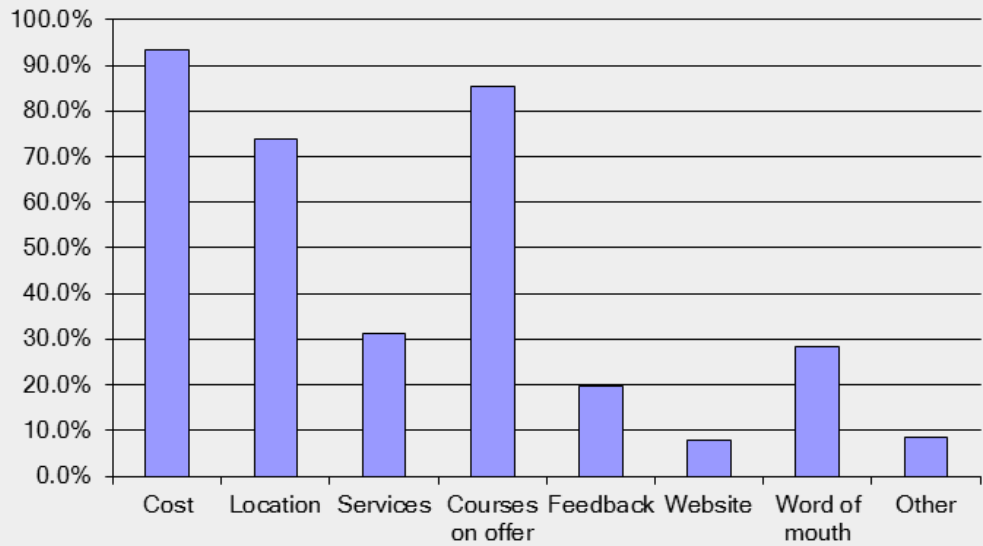
Answer Options	Response Per cent
Yes	67.0%
No	5.6%
Not sure	27.4%



There seems to be a genuine feeling amongst delegates that they can deliver more with the right amount of training.

19 What is important to you when choosing a training provider?

Answer Options	Response Per cent
Cost	93.3%
Location	73.7%
Services	31.3%
Courses on offer	85.5%
Feedback	19.6%
Website	7.8%
Word of mouth	28.5%
Other	8.4%



Amongst the other reasons were:

- Experience of trainer
- References
- Official Accreditations

Summary and Thank You

Depending on feedback from this publication, we aim to produce another survey mid 2012. It only remains for us to thank

You - Our customers for your feedback

You - Those people who took the time to complete the survey

The team at ITS Feda for producing the report

About ITS Feda

ITS Feda has an unparalleled experience in the Education and Government sector. With historic links stemming from foundations in the Further Education Development Agency (FEDA), it has grown to be recognised as a source for unbiased technical advice and guidance on training.

We provide a complete range of IT training courses from Windows 7 to ITIL, from Excel to SAP, From Apple to VMWare.

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