2015 TRAINING INDUSTRY REPORT

Now in its 34th year, The Industry Report is recognized as the training industry's most trusted source of data on budgets, staffing, and programs. This year, the study was conducted by an outside research firm May-July 2015, when members from the *Training* magazine database were e-mailed an invitation to participate in an online survey. Only U.S.-based corporations and educational institutions with 100 or more employees were included in the analysis.

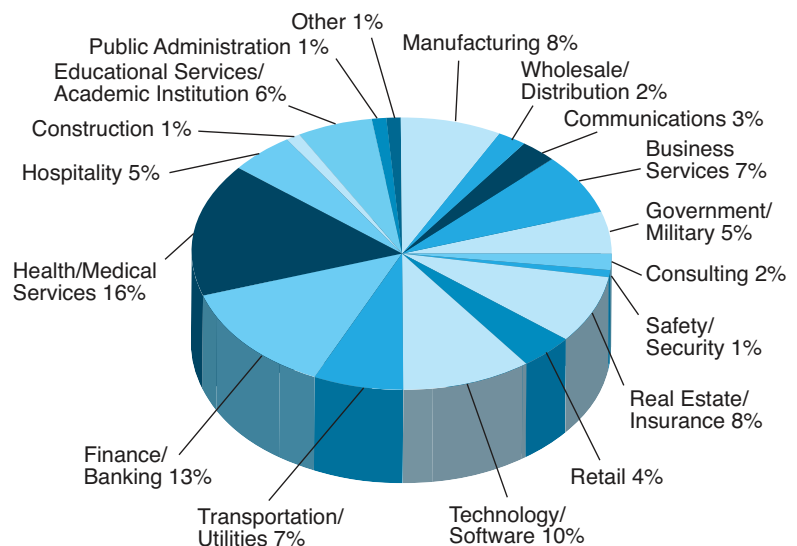The data represents a cross-section of industries and company sizes.

SURVEY RESPONDENTS

Small companies (100-999 employees)	**30%**
Midsize (1,000-9,999 employees)	**41%**
Large (10,000 or more employees)	**29%**
Total respondents	**777**

Note that the figures in this report are weighted by company size and industry according to a Dun & Bradstreet database available through Hoovers of U.S. companies. Since small companies dominate the U.S. market, in terms of sheer numbers, these organizations receive a heavier weighting, so that the data accurately reflects the U.S. market.

Industrial Classifications

Respondent profile by industry (weighted per Dun & Bradstreet).

- Other 1%
- Manufacturing 8%
- Public Administration 1%
- Wholesale/Distribution 2%
- Educational Services/Academic Institution 6%
- Communications 3%
- Construction 1%
- Business Services 7%
- Hospitality 5%
- Government/Military 5%
- Health/Medical Services 16%
- Consulting 2%
- Safety/Security 1%
- Real Estate/Insurance 8%
- Finance/Banking 13%
- Retail 4%
- Transportation/Utilities 7%
- Technology/Software 10%

About Survey Respondents:

- 47% are managers or above in the organization
- 26% are developers or instructional designers
- 28% are mid- to low-level (based on title selection) associates
- 62% determine the need for purchasing products and services
- 25% set the budget
- 32% manage requests for proposals/bids
- 68% recommend the purchase
- 19% have the final purchase decision

Total 2015 U.S. training expenditures—including payroll and spending on external products and services—took an upward trajectory, soaring 14.2 percent to $70.6 billion. Spending on outside products and services skyrocketed 29 percent from $6.1 billion to $8 billion, while other training expenditures (i.e., travel, facilities, equipment) more than doubled to $28.7 billion. Meanwhile, training payroll plummeted 20 percent to 2011-2012 levels at $33.9 billion.

The training expenditure figures were calculated by projecting the average training budget to a weighted universe of 125,778 companies, using a Dun & Bradstreet database available through Hoovers of U.S. organizations with more than 100 employees.

Note: This year, there were significantly more large companies than accounted for in past Industry Reports, in part due to mergers and acquisitions. In addition, although small companies have the smallest annual budgets, there are so many of them (98,443), that they account for 35 percent of the total budget for training expenditures.

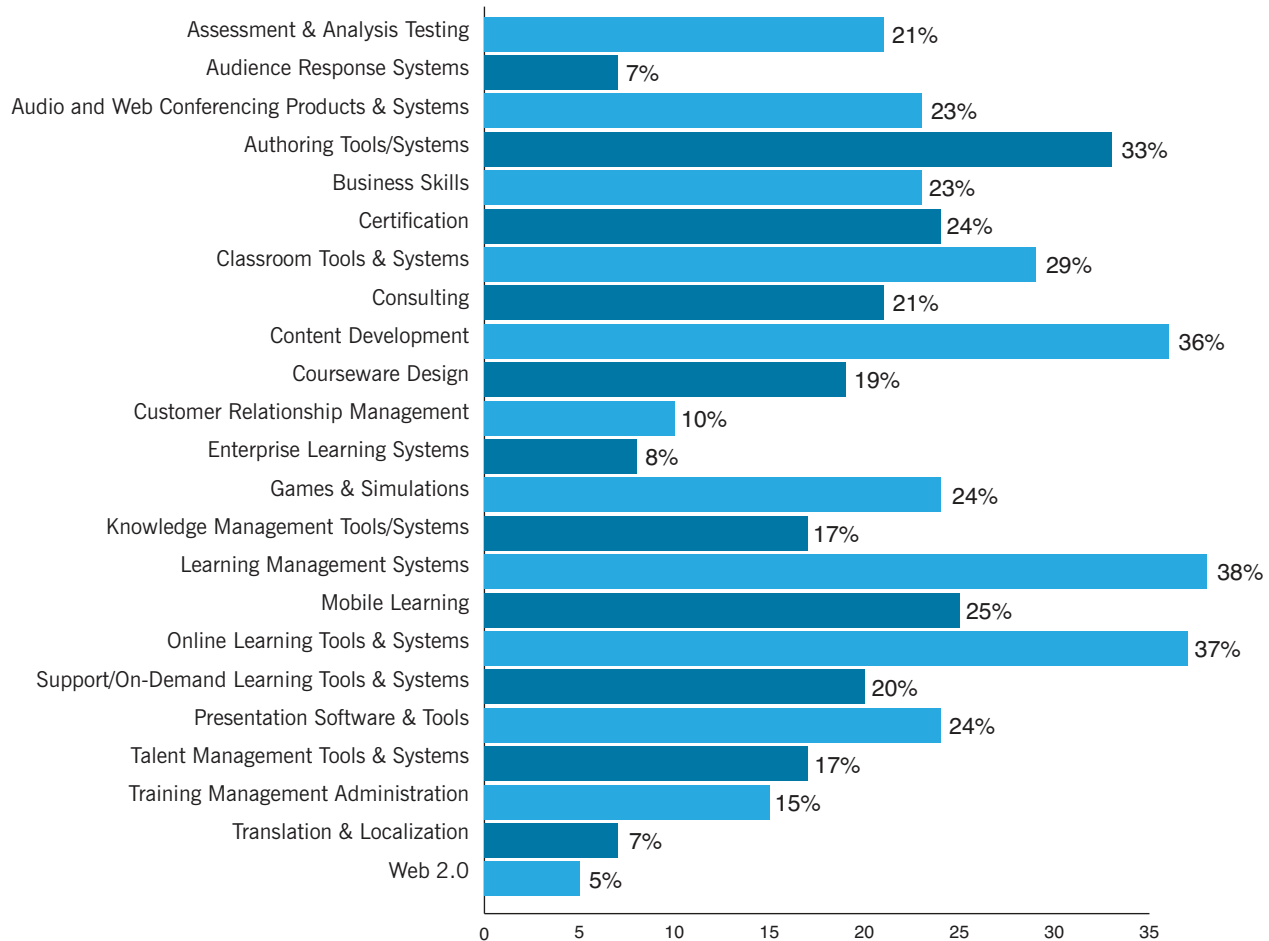## Training Expenditures 2010-2015
In $ Billions
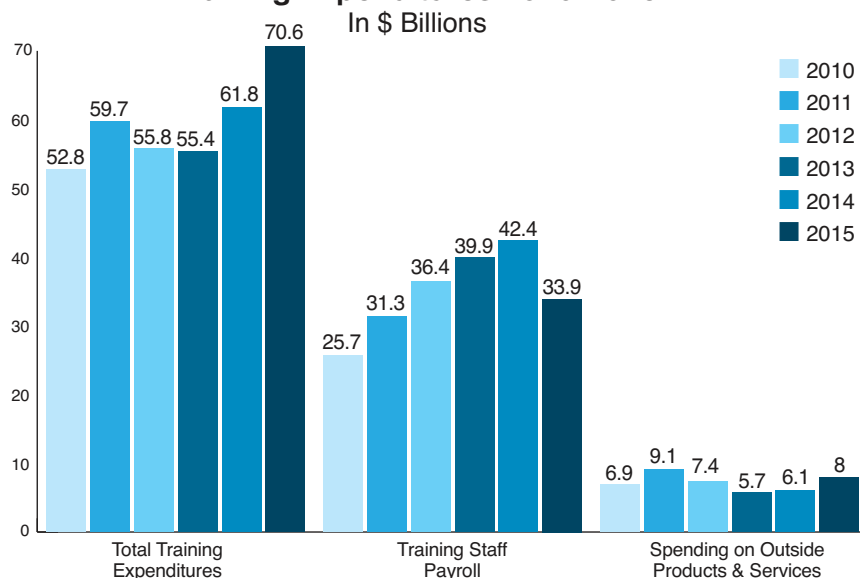
DEFINITIONS

▸ **Total training spending:** All training-related expenditures for the year, including training budgets, technology spending, and staff salaries.
▸ **Training staff payroll:** The annual payroll for all staff personnel assigned to the training function.
▸ **Outside products and services:** Annual spending on external vendors and consultants, including all products, services, technologies, off-the-shelf and custom content, and consulting services.

Average of Total Annual Budget

Organization Type	Large	Midsize	Small	Average
Education	$2,156,250	$689,350	$52,500	$807,929
Government/Military	$37,500,000	$1,948,146	$255,400	$7,605,110
Manufacturer/Distributor	$16,960,417	$1,546,074	$491,267	$5,479,795
Nonprofit	$4,545,417	$1,198,750	$189,636	$1,589,174
Association	N/A	$225,000	N/A	$225,000
Retail/Wholesale	$6,433,846	$803,750	$210,056	$2,589,224
Services	$12,137,387	$1,515,841	$388,443	$4,157,350
Avg. Across Sizes	$12,859,656	$1,402,352	$350,301	$4,113,009

TRAINING EXPENDITURES

Types of Training Products and Services Intended to Purchase Next Year

Type	Percent
Assessment & Analysis Testing	21%
Audience Response Systems	7%
Audio and Web Conferencing Products & Systems	23%
Authoring Tools/Systems	33%
Business Skills	23%
Certification	24%
Classroom Tools & Systems	29%
Consulting	21%
Content Development	36%
Courseware Design	19%
Customer Relationship Management	10%
Enterprise Learning Systems	8%
Games & Simulations	24%
Knowledge Management Tools/Systems	17%
Learning Management Systems	38%
Mobile Learning	25%
Online Learning Tools & Systems	37%
Support/On-Demand Learning Tools & Systems	20%
Presentation Software & Tools	24%
Talent Management Tools & Systems	17%
Training Management Administration	15%
Translation & Localization	7%
Web 2.0	5%

Average training expenditures for large companies decreased from $17.4 million in 2014 to $12.9 million in 2015, while the numbers for small companies ($350,301 in 2015 vs. $338,386 in 2014) and midsize companies ($1.4 million in 2015 vs. $1.5 million in 2014) remained basically flat.
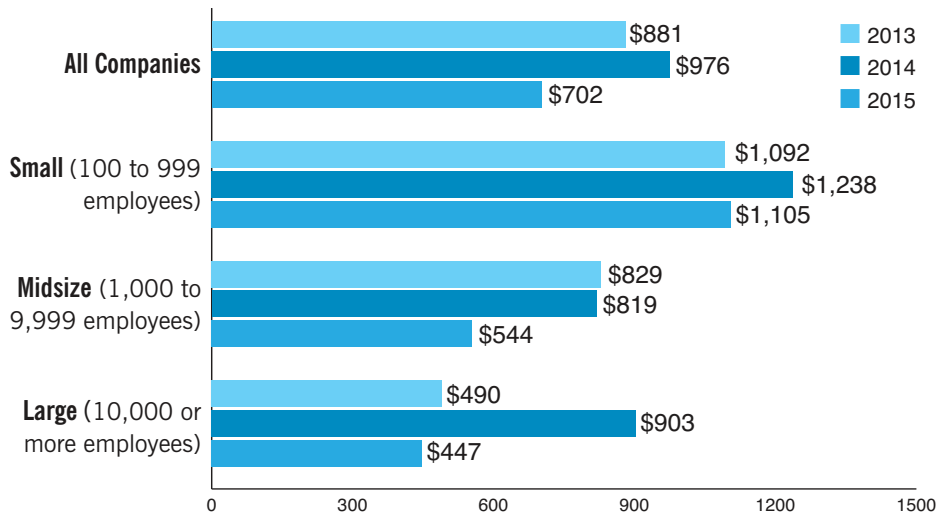
Some 37 percent of organizations said they increased staff from the year before (up from 35 percent in 2014), while 50 percent said the level remained the same (down from 51 percent in 2014). Some 13 percent said it was lower vs. 14 percent in 2014. Large nonprofits and services organizations had the largest personnel costs. Across all organization types, larger companies spent about 17 times as much as midsize, and midsize companies spent about three times as much as small ones. The average payroll figure for large companies was $7.4 million; for midsize organizations, it was $437,631; for small companies, it was $162,317.

For those who reported an increase in their training staff, the average increase was nine people, five more than in 2014. For those who reported a decrease in their staff, the average decrease was 17 people—down from 18 last year.

Other training expenditures more than doubled this year to $28.7 billion from $13.3 billion in 2014. Such expenditures can include travel, training facilities, and equipment. On average, organizations spent 5 percent of their budget or $602,306 (vs. $254,256 last year) on learning tools and technologies. Small and midsize education organizations spent the highest portion of their budgets on tools and technology (23 percent and 11 percent, respectively). Large education organizations and government/military organizations spent the smallest percentage of their training

Training Expenditures per Learner 2013-2015

All Companies
- 2013: $881
- 2014: $976
- 2015: $702

Small (100 to 999 employees)
- 2013: $1,092
- 2014: $1,238
- 2015: $1,105

Midsize (1,000 to 9,999 employees)
- 2013: $829
- 2014: $819
- 2015: $544

Large (10,000 or more employees)
- 2013: $490
- 2014: $903
- 2015: $447

Legend: ■ 2013 ■ 2014 ■ 2015

(x-axis: 0, 300, 600, 900, 1200, 1500)

Hours of Training per Employee 2014-2015

All Companies
- 2014: 40.7
- 2015: 53.8

Small (100 to 999 employees)
- 2014: 42.2
- 2015: 46.2

Midsize (1,000 to 9,999 employees)
- 2014: 41.6
- 2015: 67.4

Large (10,000 or more employees)
- 2014: 36.2
- 2015: 41.6

Legend: ■ 2014 ■ 2015

(x-axis: 0, 10, 20, 30, 40, 50, 60, 70, 80)
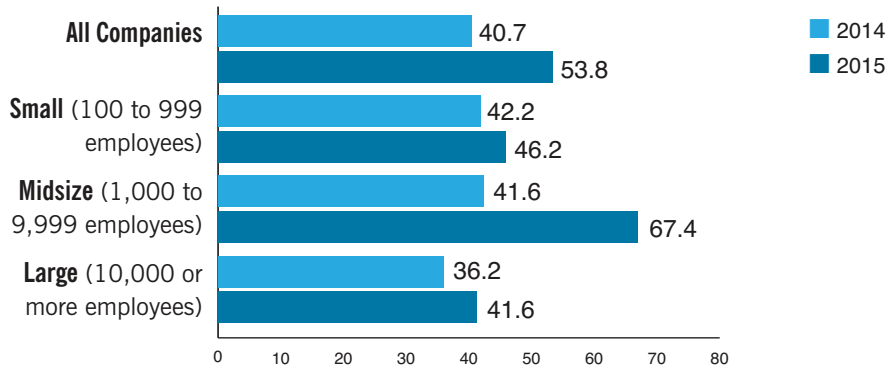
budgets on tools and technologies (1 percent or less). Looking ahead, the most frequently anticipated purchases are learning management systems (38 percent vs. 41 percent last year) and online learning tools and systems (37 percent vs. 44 percent last year). This is followed by content development (36 percent vs. 29 percent last year), authoring tools/systems (33 percent vs. 37 percent last year), classroom tools and systems (29 percent vs. 33 percent), and mobile learning (25 percent vs. 23 percent last year). Several items received 10 percent or less of hits, including Web 2.0, audience response systems, customer relationship management, translation and localization, and enterprise learning systems.

Overall, on average, companies spent $702 per learner this year compared with $976 per learner in 2014. Service organizations, overall, spent the most per learner this year ($871), followed by manufacturers ($653). Larger companies apparently are back to operating on an economy of scale as they spent less ($447) than midsize ($544) and small ($1,105) companies.

While they spent less per learner, companies provided more hours of training this year. On average, employees received 53.8 hours of training per year, 13 hours more than last year. Midsize companies provided the most hours of training this year at 67.4. Government/military organizations had the highest average number of hours overall (82.3).

Companies continued to devote the bulk of their training expenditures to training non-exempt employees (39 percent, down from 40 percent in 2014). Training for exempt non-managers increased from 26 percent to 29 percent in 2015.

TRAINING EXPENDITURES

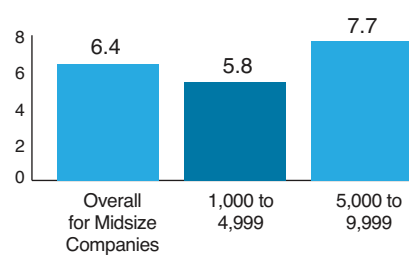### Training Expenditure Allocations— Who Gets Trained?

Category	Percentage
Executives	10%
Managers, Exempt	22%
Non-Managers, Exempt	29%
Non-Exempt Employees	39%
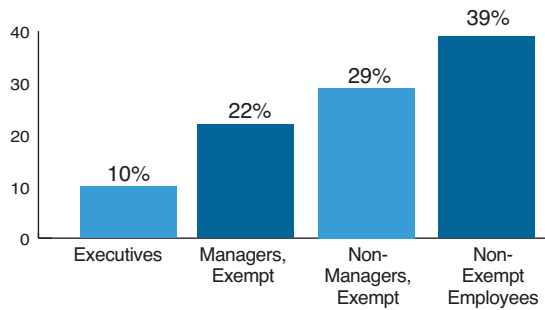
Staff per 1,000 Learners
Midsize Companies

Category	Value
Overall for Midsize Companies	6.4
1,000 to 4,999	5.8
5,000 to 9,999	7.7

Staff per 1,000 Learners
Large Companies

Category	Value
Overall for Large Companies	6.3
10,000 to 24,999	4.4
25,000 to 49,999	6.7
50,000 or more	9.8
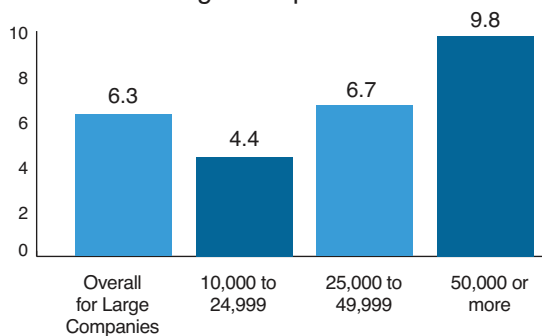
Staff per 1,000 Learners
Small Companies

Category	Value
Overall for Small Companies	11.3
100 to 249	15.3
250 to 499	9.2
500 to 999	10.6
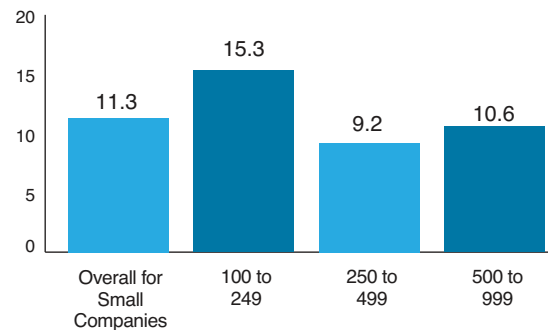
The average training budget for large companies was $12.9 million, while midsize companies allocated an average of $1.4 million, and small companies dedicated an average of $350,301.

Is the Number of Training-Related Staff Higher or Lower Than Last Year?

- Lower 13%
- Higher 37%
- Same 50%
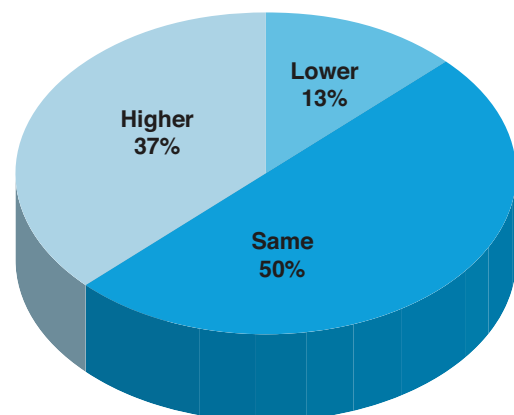
Like last year, budget status was almost evenly split, with 42 percent saying their training budget increased and 43 percent saying it remained the same. Some 15 percent reported a decrease in budget. Last year, 43 percent said their budget went up; 41 percent said it remained the same; and 16 percent said it went down. Like last year, education and government/military organizations showed the greatest tendency for training budget cuts, while services companies, retailers/wholesalers, and manufacturers/distributors all showed large gains. Increases were not evenly distributed across organization sizes. Small companies showed fewer decreases (12 percent) and more increases (46 percent) than midsize (17 percent and 37 percent) and large companies (16 percent and 44 percent).

Most of the budget increases were modest—less than 16 percent. Some 40 percent saw increases in the 6 to 15 percent range, while 29 percent of organizations reported increases in the 1 to 5 percent range. Most respondents who reported an increase in their training budgets attributed it to the following reasons:

- Increase in the scope of their training programs (63 percent vs. 65 percent last year)
- Added training staff (56 percent vs. 51 percent last year)
- Increased number of learners served (55 percent vs. 51 percent last year)

This year, more respondents (39 percent) reported budget decreases between 1 and 5 percent vs. 25 percent for 6 to 15 percent decreases and 36 percent for more than 16 percent decreases. The majority of respondents (33 percent this year vs. 40 percent last year) cited reduced training staff as the main reason for the budget decrease. This was followed by:

What Happened to Your Training Budget This Year?
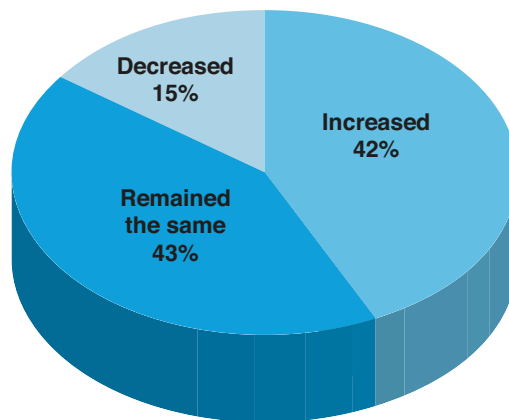
Budget Change by Industry
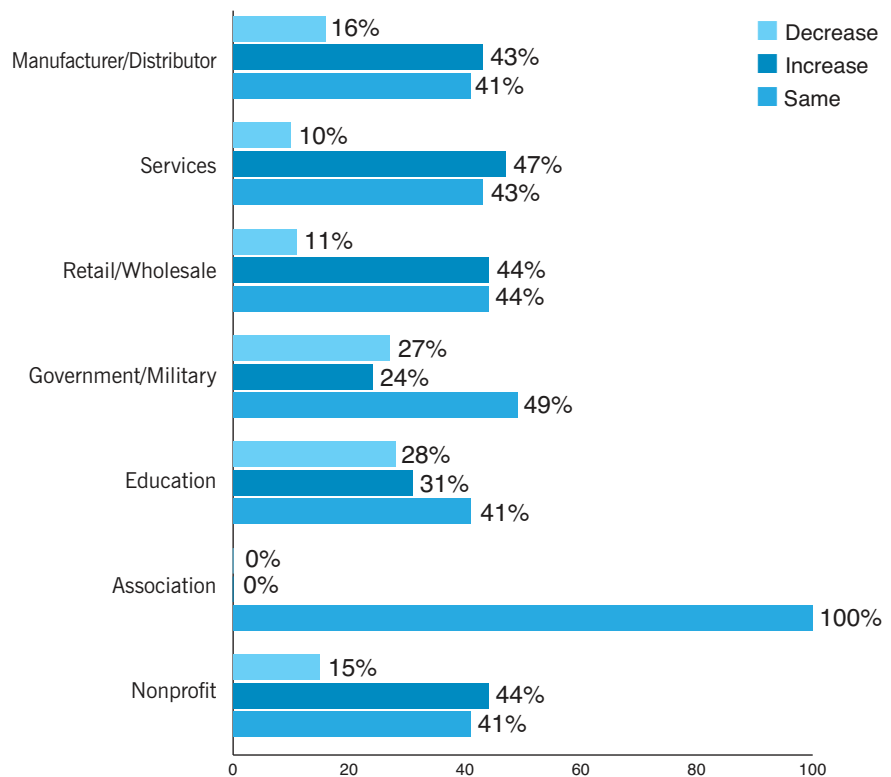
TRAINING BUDGETS

- Budget adjusted to reflect lower costs (31 percent vs. 24 percent last year)
- Some 30 percent (vs. 44 percent last year) chose "other" as the reason for the decrease, citing "increased virtual training offerings," "corporate expense controls," and "new director/no emphasis on the Learning function," among others.
- Decreased outside trainer/consultant investment (24 percent vs. 18 percent last year, moving up to the No. 4 reason)
- Decreased scope of training (decreasing from 22 percent last year to 19 percent this year)

Like the last three years, the highest percentage of organizations (29 percent) said management/supervisory training will receive more funding than the year before. On average, organizations plan to allocate the most funding to professional/industry-specific training at $2.1 million; onboarding at $1.7 million; sales training at $751,542; and management/supervisory training at $728,250.

The highest priorities for training in terms of allocating resources in 2015 are: increasing the effectiveness of training programs (29 percent, the same as last year), followed by reducing costs/improving efficiency (19 percent vs. 17 percent last year), and measuring the impact of training programs (16 percent vs. 10 percent last year). Like last year, learning infrastructure/technology initiatives and obtaining revenue through external training remain the lowest priorities.

How Much Did Your Training Budget Increase?

All Companies

Category	Percent
More Than 25%	15%
16% to 25%	16%
6% to 15%	40%
1% to 5%	29%

Small Companies

Category	Percent
More Than 25%	20%
16% to 25%	15%
6% to 15%	38%
1% to 5%	27%

Midsize Companies

Category	Percent
More Than 25%	13%
16% to 25%	18%
6% to 15%	40%
1% to 5%	29%

Large Companies

Category	Percent
More Than 25%	10%
16% to 25%	13%
6% to 15%	42%
1% to 5%	35%
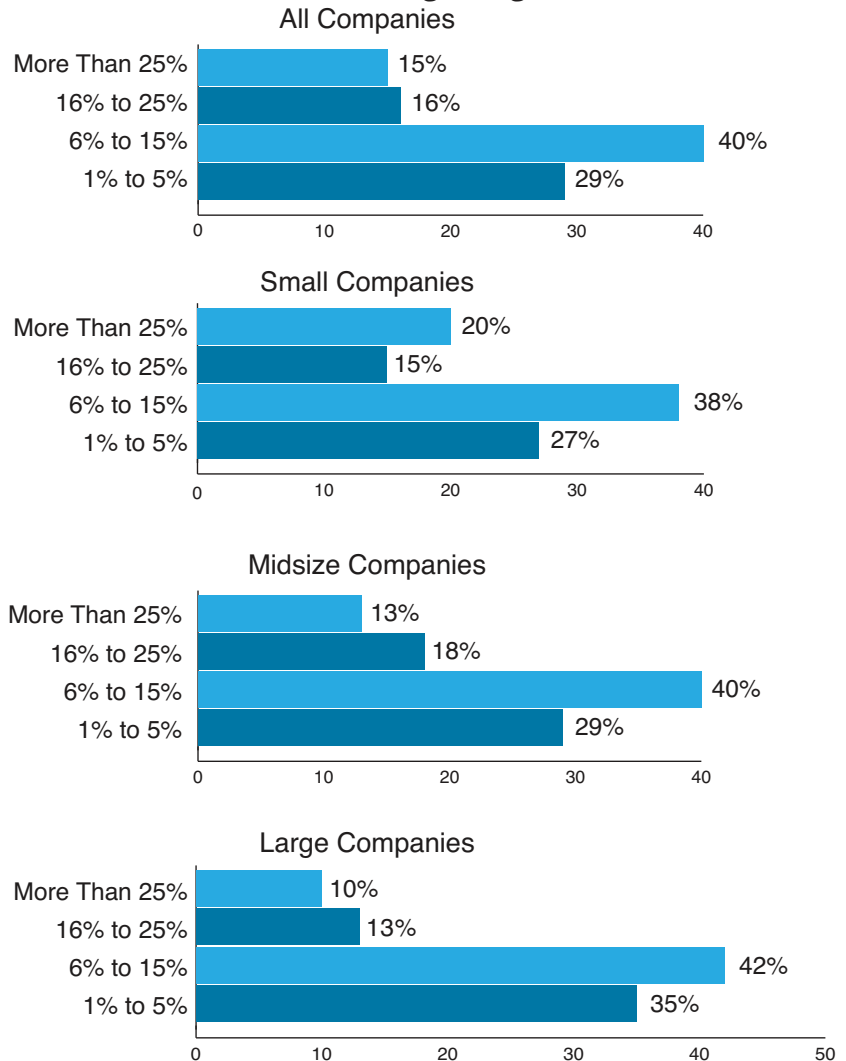
Why Did Your Budget Increase?

Category	Percent
Added Training Staff	56%
Increased Number of Learners Served	55%
Increased Scope of Training	63%
Attended More Outside Learning Events (conferences/seminars)	17%
Increased Outside Trainer/Consultant Investment	15%
Purchased New Technologies/Equipment	40%
Budget Adjusted to Reflect Higher Costs	23%
Other	5%
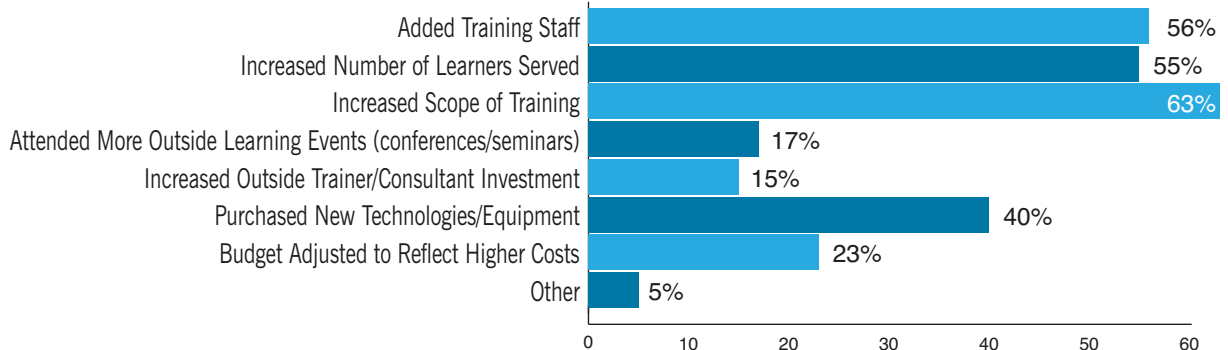
How Much Did Your Training Budget Decrease?

All Companies

More Than 25%	18%
16% to 25%	18%
6% to 15%	25%
1% to 5%	39%

(x-axis: 0, 10, 20, 30, 40)

Small Companies

More Than 25%	31%
16% to 25%	13%
6% to 15%	18%
1% to 5%	38%

(x-axis: 0, 10, 20, 30, 40)

Midsize Companies

More Than 25%	19%
16% to 25%	19%
6% to 15%	31%
1% to 5%	31%

(x-axis: 0, 10, 20, 30)

Large Companies

More Than 25%	0%
16% to 25%	21%
6% to 15%	21%
1% to 5%	58%

(x-axis: 0, 10, 20, 30, 40, 50, 60)
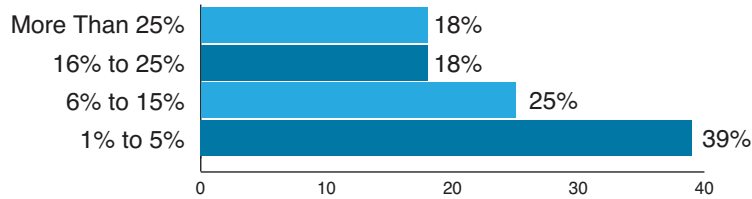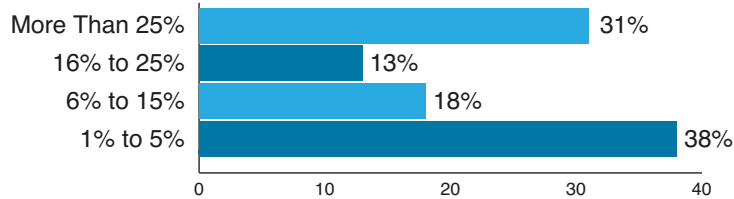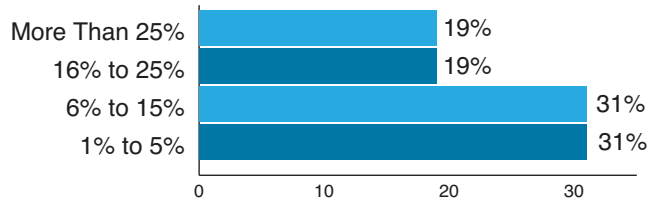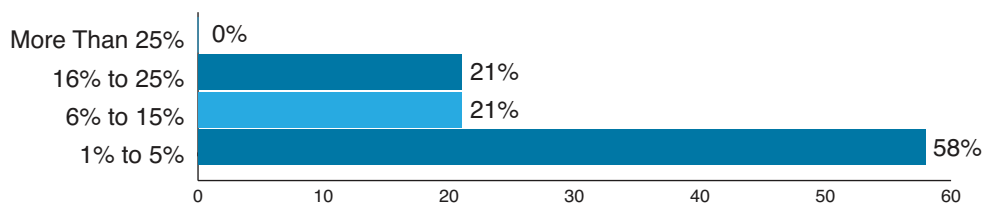
Why Did Your Budget Decrease?

Reduced Training Staff	33%
Decreased Number of Learners Served	7%
Decreased Scope of Training	19%
Attended Fewer Outside Learning Events (conferences/seminars)	13%
Decreased Outside Trainer/Consultant Investment	24%
Budget Adjusted to Reflect Lower Costs	31%
Other	30%

(x-axis: 0, 5, 10, 15, 20, 25, 30, 35)
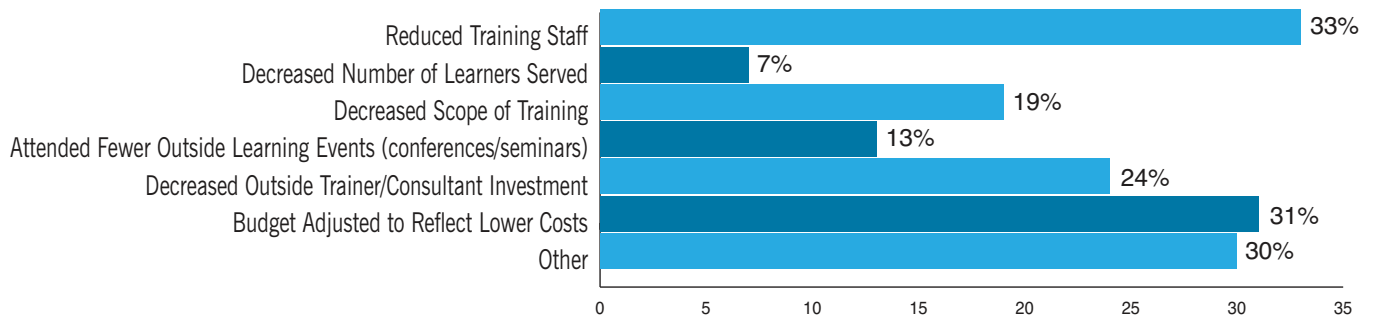
TRAINING BUDGETS

Projected Funding for Learning Areas Next Year

Learning Area	More Than Last Year	About the Same as Last Year	Less Than Last Year	N/A
Executive Development	13%	55%	6%	26%
Management/Supervisory Training	29%	58%	6%	7%
Interpersonal Skills (e.g., communication, teamwork)	20%	62%	6%	12%
IT/Systems Training (e.g., enterprise software)	19%	55%	8%	18%
Desktop Application Training	11%	60%	10%	19%
Customer Service Training	21%	55%	6%	18%
Sales Training	19%	36%	6%	39%
Mandatory or Compliance Training	16%	72%	7%	5%
Profession/Industry-Specific (engineering, accounting, etc.)	13%	66%	4%	17%
Onboarding	27%	55%	5%	13%

■ More Than Last Year ■ About the Same as Last Year ■ Less Than Last Year ■ N/A

TRAINING DELIVERY

Some 46 percent of training hours were delivered by a stand-and-deliver instructor in a classroom setting—down a bit from the 47 percent reported last year.

- 31.9 percent of hours were delivered with blended learning techniques, up a bit from 29.1 percent last year.
- 26.4 percent of hours were delivered via online or computer-based technologies, down from 28.5 percent last year. Virtual classroom/Webcast accounted for 16 percent of hours delivered, down slightly from 14 percent last year.
- 1.8 percent of training hours were delivered via mobile devices, virtually the same as in 2014, while social

learning accounted for 5 percent of hours, up a bit from 4.2 percent last year. Some 25 percent of companies said they are using social learning to some extent.

Small (54.6 percent) and midsize (43.4 percent) companies continue to rely on instructor-led delivery methods more so than large companies (37.4 percent). Blended learning was fairly even across companies of all sizes, ranging between 28.4 percent for large companies and 35.6 percent for small ones. Large and midsize companies appeared to be focusing on online or computer-based methods (29 percent vs. 20.8 percent for small and midsize companies).

Training Delivery Methods by Company Size 2015

Company Size	Blended Learning	Instructor-Led Classroom Only	Virtual Classroom/Webcast Only	Online or Computer-Based Methods Only	Mobile Only	Social Learning Only
Small (100 to 999 employees)	35.6%	54.6%	18.7%	20.8%	1.1%	5.6%
Midsize (1,000 to 9,999 employees)	30.5%	43.4%	14.1%	29.6%	1.1%	4.4%
Large (10,000 or more employees)	28.4%	37.4%	16.7%	29.1%	4.1%	5.3%

■ Blended Learning (a combination of methods listed below)
■ Instructor-Led Classroom Only
■ Virtual Classroom/Webcast Only (instructor from remote location)
■ Online or Computer-Based Methods Only (no instructor)
■ Mobile Only (cell phones, iPods, tablets, PDAs)
■ Social Learning Only

Mandatory or compliance training continued to be done mostly online, with 73 percent of organizations doing at least some of it online and 26 percent entirely online (up from 20 percent last year). Online training also often is used for desktop application training (70 percent vs. 56 percent last year) and IT/systems application training (67 percent, up from 54 percent last year). Online training was least used for onboarding (31 percent had no online training for it), executive development and interpersonal skills training (28 percent had no online training for either one), and customer service and sales training (27 percent had no online training for either one).

Technology use overall is higher than last year. Of the learning technologies presented, the most often used included:
- Learning management systems (LMS) at 73 percent,

followed by virtual classroom/Webcasting/video broadcasting at 72 percent (both down just a bit from 74 percent last year)
- Rapid e-learning tool (51 percent, up from 48 percent last year)
- Application simulation tool (40 percent, up from 33 percent last year)

The delivery methods least often used for training remained the same as last year:
- Podcasting at 16 percent (up from 11 percent last year)
- Learning content management system (LCMS) at 20 percent (down from 25 percent)
- Online performance support (EPSS) or knowledge management system at 23 percent (up from 21 percent)

Online Method Use for Types of Training

Type of Training	No Online	A Few Online Programs	Some Online	Mostly Online	All Online
Executive Development	28%	40%	25%	5%	2%
Management/Supervisory Training	21%	37%	33%	8%	1%
Interpersonal Skills (e.g., communication)	28%	30%	29%	11%	2%
IT/Systems Training (e.g., enterprise software)	17%	25%	29%	25%	4%
Desktop Application Training	22%	22%	29%	20%	7%
Customer Service Training	27%	30%	30%	11	2%
Sales Training	27%	34%	27%	10%	2%
Mandatory or Compliance Training	12%	18%	14%	30%	26%
Profession/Industry-Specific (e.g., engineering)	24%	29%	36%	10%	1%
Onboarding	31%	31%	22%	13%	3%

Some 46 percent of training hours were delivered by a stand-and-deliver instructor in a classroom setting. That figure is down slightly from the 47 percent reported last year. Some 25 percent of companies are using social learning to some extent.

TRAINING DELIVERY

Learning Technologies Current Usage All Companies

Technology	Use currently	Do not use	Not sure
Podcasting	16%	78%	6%
Online Performance Support or Knowledge Management System	23%	66%	11%
Rapid E-Learning Tool (PowerPoint conversion tool)	51%	41%	8%
Application Simulation Tool	40%	54%	6%
Virtual Classroom/Webcasting/Video Broadcasting	72%	2%	26%
Learning Content Management System (LCMS)	20%	70%	10%
Learning Management System (LMS)	73%	23%	4%
Mobile Applications	25%	70%	5%

Small Companies

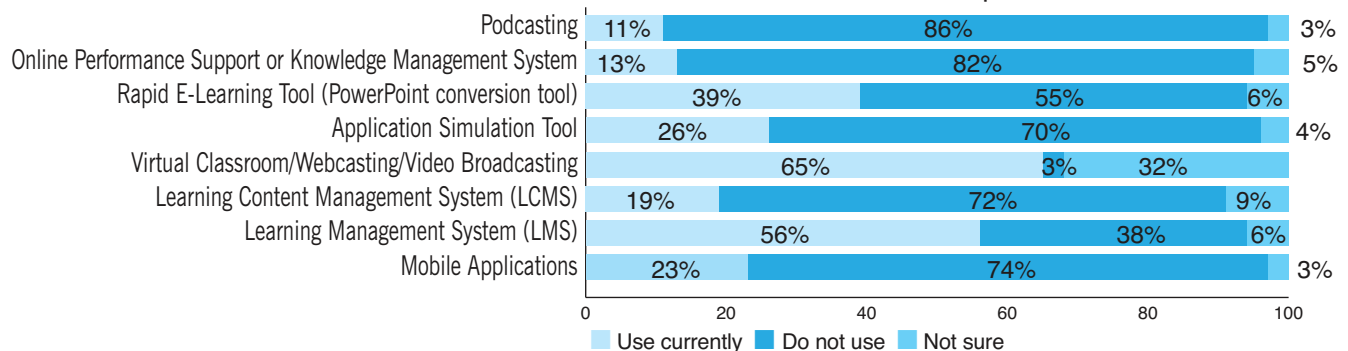| Technology	Use currently	Do not use	Not sure
Podcasting	11%	86%	3%
Online Performance Support or Knowledge Management System	13%	82%	5%
Rapid E-Learning Tool (PowerPoint conversion tool)	39%	55%	6%
Application Simulation Tool	26%	70%	4%
Virtual Classroom/Webcasting/Video Broadcasting	65%	3%	32%
Learning Content Management System (LCMS)	19%	72%	9%
Learning Management System (LMS)	56%	38%	6%
Mobile Applications	23%	74%	3%

Midsize Companies

Technology	Use currently	Do not use	Not sure
Podcasting	18%	78%	4%
Online Performance Support or Knowledge Management System	22%	63%	15%
Rapid E-Learning Tool (PowerPoint conversion tool)	54%	37%	9%
Application Simulation Tool	41%	53%	6%
Virtual Classroom/Webcasting/Video Broadcasting	72%	2%	26%
Learning Content Management System (LCMS)	16%	77%	7%
Learning Management System (LMS)	80%	18%	2%
Mobile Applications	21%	74%	5%

Large Companies

Technology	Use currently	Do not use	Not sure
Podcasting	21%	64%	15%
Online Performance Support or Knowledge Management System	46%	43%	11%
Rapid E-Learning Tool (PowerPoint conversion tool)	67%	24%	9%
Application Simulation Tool	64%	28%	8%
Virtual Classroom/Webcasting/Video Broadcasting	87%	0%	13%
Learning Content Management System (LCMS)	29%	54%	17%
Learning Management System (LMS)	92%	6%	2%
Mobile Applications	38%	53%	9%

2015 saw only a slight increase in the average expenditure for training outsourcing: $306,683, up from $303,833 in 2014. Large companies on average spent $1.1 million vs. $195,144 for midsize companies and $34,181 for small ones. An average of 6 percent of the total training budget was spent on outsourcing in 2015, down from 8 percent in 2014.

On average, 26 percent of companies completely outsourced LMS operations/hosting (vs. 29 percent last year), while learner support and LMS administration (83 percent) largely were handled in-house.

Instruction/facilitation was handled about equally in-house (47 percent) and outsourced (53 percent). Across all the topic areas, large companies outsourced more than midsize ones, and midsize organizations outsourced more than small companies. This effect was most striking for custom content development (60 percent some or completely outsourced for

large companies; 43 percent for midsize ones; and 37 percent for small organizations).

The level of outsourcing is expected to stay relatively steady in 2016—some 84 percent of organizations said they expect to stay the same in the outsourcing area. The percentage of companies expecting to decrease use (7 percent) is slightly lower than those expecting to use outsourcing more (9 percent). There are exceptions for individual functions, though. In learner support, more than twice as many companies said they will be doing less than those that said they will be doing more.

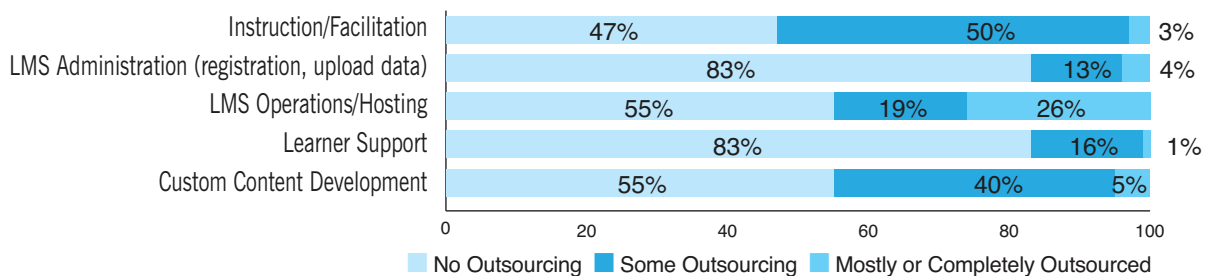While there aren't many differences between the outsourcing changes by company size, large companies will outsource less custom content development, while midsize and small companies indicate they will increase learner support outsourcing.

> 2015 saw a slight increase in the average expenditure for training outsourcing: $306,683, up from $303,833 in 2014. An average of 6 percent of the total training budget was spent on outsourcing. The level of outsourcing is expected to stay relatively steady in 2016.

Extent of Outsourcing All Companies

	No Outsourcing	Some Outsourcing	Mostly or Completely Outsourced
Instruction/Facilitation	47%	50%	3%
LMS Administration (registration, upload data)	83%	13%	4%
LMS Operations/Hosting	55%	19%	26%
Learner Support	83%	16%	1%
Custom Content Development	55%	40%	5%

Extent of Outsourcing Small Companies

	No Outsourcing	Some Outsourcing	Mostly or Completely Outsourced
Instruction/Facilitation	42%	54%	4%
LMS Administration (registration, upload data)	85%	11%	4%
LMS Operations/Hosting	58%	14%	28%
Learner Support	83%	16%	1%
Custom Content Development	63%	33%	4%

Midsize Companies

	No Outsourcing	Some Outsourcing	Mostly or Completely Outsourced
Instruction/Facilitation	48%	50%	2%
LMS Administration (registration, upload data)	79%	15%	6%
LMS Operations/Hosting	50%	24%	26%
Learner Support	87%	13%	0%
Custom Content Development	57%	40%	3%

Large Companies

	No Outsourcing	Some Outsourcing	Mostly or Completely Outsourced
Instruction/Facilitation	54%	44%	2%
LMS Administration (registration, upload data)	82%	15%	3%
LMS Operations/Hosting	60%	21%	19%
Learner Support	76%	21%	3%
Custom Content Development	40%	52%	8%

Looking ahead to 2016, large companies likely will outsource less custom content development, while midsize and small companies indicate they will increase learner support outsourcing.

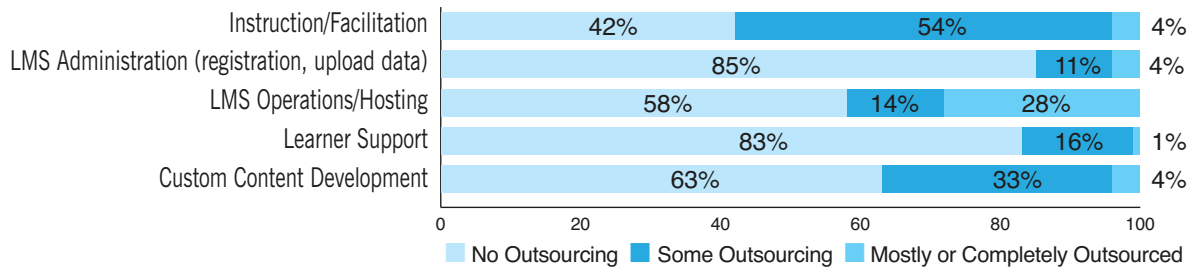## Projected Use of Outsourcing All Companies

	More Outsourcing	The Same	Less Outsourcing	We Don't/Won't Outsource This Function
Instruction/Facilitation	10%	48%	8%	34%
LMS Administration (registration, upload data)	5%	45%	4%	46%
LMS Operations/Hosting	10%	55%	4%	31%
Learner Support	4%	41%	10%	45%
Custom Content Development	14%	40%	11%	35%

0   20   40   60   80   100

- ■ More Outsourcing ■ The Same ■ Less Outsourcing
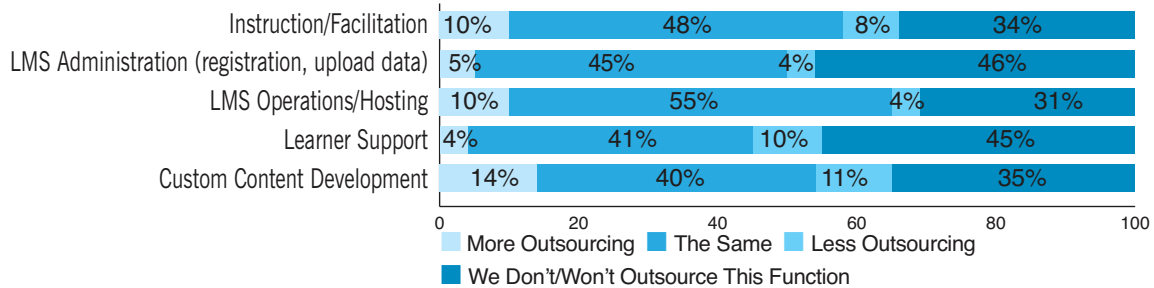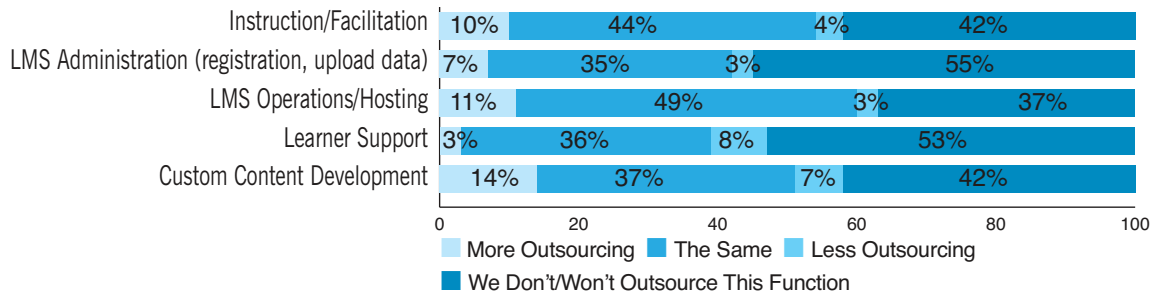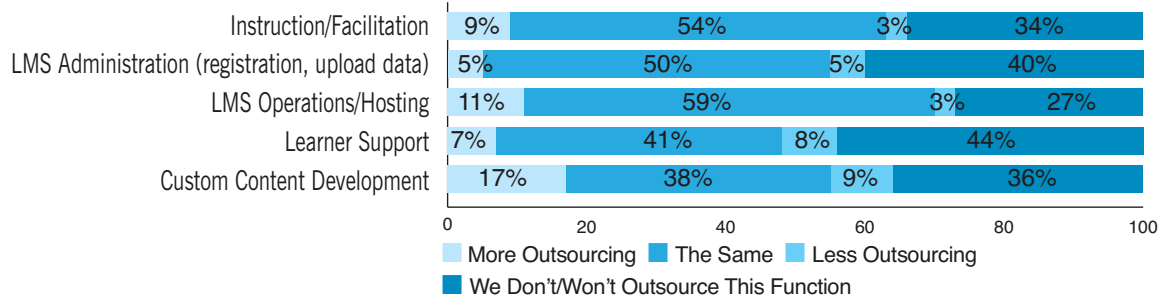- ■ We Don't/Won't Outsource This Function

Small Companies

	More Outsourcing	The Same	Less Outsourcing	We Don't/Won't Outsource This Function
Instruction/Facilitation	10%	44%	4%	42%
LMS Administration (registration, upload data)	7%	35%	3%	55%
LMS Operations/Hosting	11%	49%	3%	37%
Learner Support	3%	36%	8%	53%
Custom Content Development	14%	37%	7%	42%

0   20   40   60   80   100

- ■ More Outsourcing ■ The Same ■ Less Outsourcing
- ■ We Don't/Won't Outsource This Function

Midsize Companies

	More Outsourcing	The Same	Less Outsourcing	We Don't/Won't Outsource This Function
Instruction/Facilitation	9%	54%	3%	34%
LMS Administration (registration, upload data)	5%	50%	5%	40%
LMS Operations/Hosting	11%	59%	3%	27%
Learner Support	7%	41%	8%	44%
Custom Content Development	17%	38%	9%	36%

0   20   40   60   80   100

- ■ More Outsourcing ■ The Same ■ Less Outsourcing
- ■ We Don't/Won't Outsource This Function

Large Companies

	More Outsourcing	The Same	Less Outsourcing	We Don't/Won't Outsource This Function
Instruction/Facilitation	10%	44%	25%	21%
LMS Administration (registration, upload data)	3%	53%	5%	39%
LMS Operations/Hosting	5%	60%	6%	29%
Learner Support	3%	52%	18%	27%
Custom Content Development	10%	47%	23%	20%

0   20   40   60   80   100

- ■ More Outsourcing ■ The Same ■ Less Outsourcing
- ■ We Don't/Won't Outsource This Function