Training Market Report 2015

Description: This report examines the UK training industry, covering vocational, professional and personal training. This includes business development training undertaken by enterprises of all sizes (from micro- to large-sized organisations), as well as that carried out by the public sector and not-for-profit organisations (NPOs) and charities. The report's analysis examines skilled training; 'upskilling', which seeks to improve soft skills such as time management; and basic skills training in subjects such as communication, numeracy and ICT. The report's analysis focuses primarily on training provided by employers for their employees who already possess the basic skills and knowledge required to carry out their work (as opposed to vocational or educational training necessary to function and perform in a given role).

A number of different providers operate within the training market in the UK, but this report focuses predominantly on businesses that are primarily engaged in delivering training as a formalised service, and which generate the majority of their income from this particular activity. It should be noted that some providers, such as further education (FE) colleges and universities, derive the majority of their revenue from other sources extraneous to training activities. The providers covered by the scope of this report including the following:

- Business schools/universities/management colleges - examples include Roffey Park Management Centre, London Business School, Manchester Business School, Henley Business School, Nottingham University Business School and Durham University Business School.
- Chambers of Commerce - the major Chambers of Commerce include those in London, Manchester, Coventry, Birmingham and Leeds. These institutions often run a number of courses through the Chamber Skills Network, with a focus on business training and coaching.
- Colleges of FE - these provide vocational education and training. Although most courses are public programmes, some may be created for specific clients. These institutions are also important as venues for training, and are sometimes used by external training providers and clients to run training courses.
- Distance learning providers - these organisations provide learning materials and tuition by post or, increasingly, online. This means they can reach a large audience which rivals may not be in a position to do. Examples of distance learning providers include the Rapid Results College (RRC) and The Open University (OU).
- Independent training organisations - these include NPOs and private or commercial organisations. A number of independent training organisations are owned by charitable trusts and operate according to their trust status; this usually means that they are required to conduct at least part of their activities for the public good.
- In-house providers - businesses often run a wide range of internal training courses that meet the specific needs of their corporation. Some internal courses, however, have been so successful they have been offered out to external parties at a fee.
- IT companies - many of the larger IT firms, such as Oracle, IBM and Microsoft, offer training courses designed around their range of software/products and have become important suppliers in recent years.
- Management consultancies - some of these offer training courses, usually focused on business, management and leadership. Such courses are often highly tailored programmes, usually providing a mixture of consultancy and training to the client.
- Professional/institutional bodies - trade organisations are particularly important sources of current training practices and up-to-date qualifications, as they often set standards for their sector. This means they are often well placed to develop training courses that meet their own standards. Such bodies also have the added advantage of extensive first-hand knowledge of the specialist market in which they operate. Examples include the Chartered Institute of Marketers (CIM), the Chartered Institute of Public Relations (CIPR), the Chartered Institute of Personnel & Development (CIPD) and the Institute of Directors (IoD).
- Sole practitioners - these are widespread in the training market and are usually individual consultants/practitioners or business entrepreneurs who have set up their own training service. These services may be delivered by the sole practitioner alone or in association with other individuals or companies/trade associations. Some are connected with business schools and universities, or they may work on an ad-hoc/freelance basis for large training organisations.

Training can also be delivered using a variety of channels and methods. The main types of training channels analysed by this report include the following:
- Classroom learning - training is delivered from a live instructor in a classroom setting that can incorporate a variety of learning principles, such as lectures, demonstrations, hands-on workshops, and end-of-course exams or tests.
- Distance learning courses - includes training courses that can be undertaken remotely without being in regular face-to-face contact with a teacher in a classroom. These types of courses often include correspondence courses provided by external suppliers or in-house training departments that can be carried out online or by post, or may form part of a course which is partly delivered at a specific location.
- Intranet-based courses - these are training courses that have been developed in-house by a company or organisation specifically for their employees, often with the help of an outside training provider, which are delivered over an organisation's internal IT network.
- In-house courses - training programmes that are developed and delivered internally within an organisation. These types of courses are specifically targeted at the in-house employee base and address specific in-house skills requirements.
- Open courses - these tend to last between 1 to 3 days and are available to any member of the general public who wants to take part.
- Tailored/bespoke courses - these are training programmes that have been created, usually by an external provider, for a specific client according to their individual needs and requirements. These types of courses may take place at a training centre, hotel or conference centre, or at the client's own premises.
- Electronic and mobile learning (e-learning and m-learning, respectively) - these are forms of distance learning courses that are delivered online. E-learning courses can include massive open online courses (MOOCs), webinars, virtual classrooms and web conferencing, and online tutorials and lessons, etc.
- Blended learning - usually refers to training comprised of a mixture of e-learning and classroom teaching.

**MARKET SECTORS**

The training market can be broadly divided into public-sector provision and private-sector provision. Although there is significant crossover between the two, market size data has been separated by public- and private-sector expenditure for the purposes of this report in line with reporting by trade sources. The main types of training examined by this report include the following:

- Training for school leavers and graduates - includes vocational training, such as apprenticeship schemes, university and FE college sandwich courses, as well as graduate training schemes and other work-based placement training.
- Professional and technical training - this type of training is generally provided for graduates that are specialising in a specific field, such as law, engineering, accountancy, banking, insurance, medicine and computing. It should be noted that initial training within these areas is usually classified as education rather than training.
- Skills training and development - skills training focuses on the particular functions needed to fulfil a specific job role, such as finance, sales and marketing, personnel, IT, production, purchasing and supply, logistics, administration and clerical, customer care, human resources (HR) and business development.
- Management and leadership development and organisation development - this type of training is often referred to as ‘people development’ and tends to be broader in scope than the other types of training previously outlined. This type of training may be designed for a particular client base or can be tailored to the specialist needs of individual clients.
- Personal and professional development - this category refers to training that is relevant to activities both inside and outside the workplace that, as such, may offer personal benefits to recipients. Examples include courses and programmes that focus on soft skills, such as communication, stress management, assertiveness or organisational skills. It can also include training courses that have a more specific focus, such as sexual harassment training or ethics and diversity training.

**Contents:**

1. Introduction & Definition
2. REPORT COVERAGE
3. MARKET SECTORS
   Executive Summary
   What's KEY in the Market?
4. KEY DRIVERS
5. MARKET TRENDS
Internal Training Programmes Continue to Win Out Over External Providers
Are Apprenticeships the Key to Improving Unemployment in the UK?
UK E-Learning Market Largest in Europe
Further Funding Cuts to Affect Training in the Public Sector

6. ECONOMIC TRENDS

7. MARKET POSITION

8. HOW ROBUST IS THE MARKET?
Market Size, Segmentation & Forecasts

9. MARKET SIZE & SEGMENTATION
The Total Market

10. FORECASTS
Future Trends
Future Economic Trends
Forecast Total Market

11. MARKET GROWTH
International Perspective

12. OVERVIEW
Competitor Analysis

13. MARKET LEADERS
IBM UK Ltd
Babcock International Group PLC
Capita Business Services Ltd
Staffline Group PLC
A4E Ltd
Ingeus UK Ltd
Learndirect Ltd
QA Ltd
Wilmington PLC
Euromoney Trading Ltd

14. OTHER COMPANIES
Accountancy and Finance Training
General Management
Human Resources Management/Personal Development
Information Technology
Outdoor Training
Project Management
Quality Assurance
Sales and Marketing

15. NUMBER OF COMPANIES
By Turnover
By Employment
Regional Variation in the Marketplace

16. KEY TRADE ASSOCIATIONS

17. EXHIBITIONS/TRADE SHOWS
Buying Behaviour

18. OVERVIEW

19. TYPES OF TRAINING PRACTICES USED AND E-LEARNING
Training Practices Used and Effectiveness
E-Learning
20. TALENT MANAGEMENT
Objectives of Talent Management Activities
Effectiveness of Talent Management Activities

21. LEARNING AND DEVELOPMENT PROFESSIONALS
Methods Used to Develop Skills
Contributors to the Success of L&D Professionals

22. ASSESSING RETURN ON INVESTMENT
Measurability
Difficulties Encountered in Measuring ROI

23. TRAINING EXPENDITURE AND BUDGET PRESSURES
Median Expenditure on Training
Economic Pressures
How Have Budgets and Headcounts Changed Over the Past Year?
Budget Projections
Strengths, Weaknesses, Opportunities & Threats
STRENGTHS
WEAKNESSES
OPPORTUNITIES
THREATS
PESTEL

24. POLITICAL
Employer Ownership of Skills Scheme Continues to Fund Traineeships
Apprenticeships and Employment to Represent Key Battleground in the Run Up to 2015 General Election
LGA Urges More Power be Given to Councils to Improve Youth Training and Employment

25. ECONOMIC
Economy Grows at Fastest Rate Since 2007

26. SOCIAL
The Rise of the Casual Worker and Zero-Hour Contracts
Gender Skills Gaps Continue to Widen
Lack of Basic Skills Among Younger Generation Hindering Workforce

27. TECHNOLOGICAL
The Growth of MOOCs: A Threat or a Benefit to L&D
Virtual Reality: The Solution to Practical Skills Training?

28. LEGISLATIVE
Apprenticeship Reforms Announced
Further Sources
Associations
Publications
Government Publications
Other Sources

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