



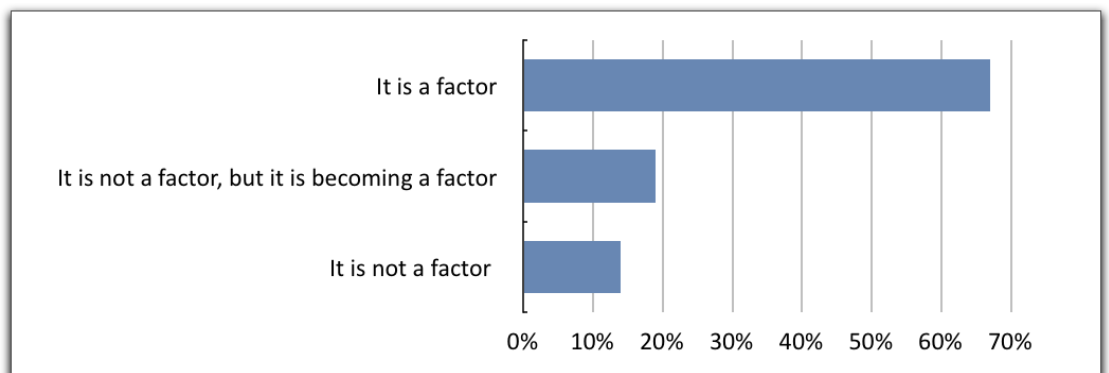
Web Conferencing Training Trends 2010: North America

Organizations around the globe are increasingly looking to Web conferencing to cut costs and improve productivity. A major driver of this trend is in the training function, where organizations are using live online training to address economic pressures and achieve greater efficiencies. However, supporting data on this trend is sparsely available.

This research brief results from a survey exploring the motivation of trainers in North America for their use of Web conferencing. The short online survey, conducted by 1080 Group, LLC on behalf of Citrix Online gathered 437 responses in September 2009.

Respondents were asked about their training experience, both overall, and using Web conferencing for training. Fifty-three percent of the survey respondents had more than ten years of training experience. Another 22% had five to ten years of experience. Fifty-one percent of total respondents had never used Web conferencing to conduct training.

Key findings of the survey indicate that the top business drivers include saving on travel budgets and increasing trainers' reach. Trainers project their use of Web conferencing for training in the next year will grow by a robust 34%. Not surprisingly, when asked how travel costs factor into their decision to move training online, only 14% noted "it is not a factor."



How would you characterize how the cost of travel factors into your decision to move training online? (Select one)

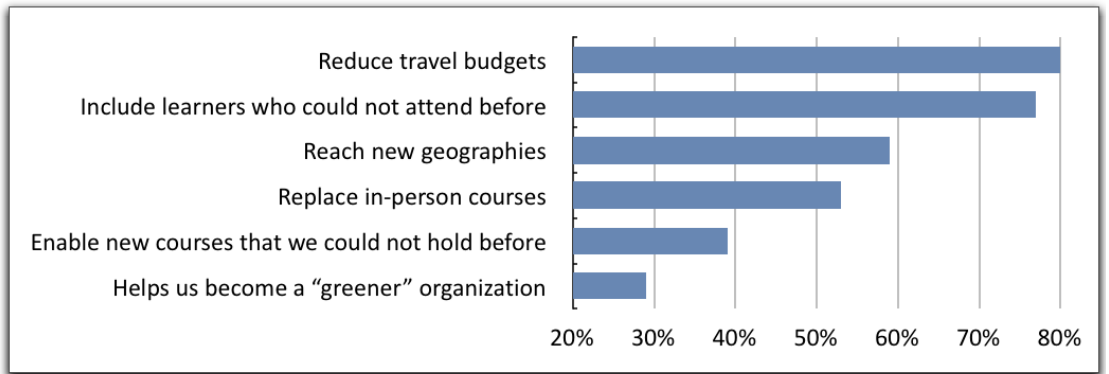
Understandably, the top reason cited for what would inhibit the use of Web conferencing for training is "training content that doesn't display on a computer."

1080 Group concludes that while pressured budgets may be a catalyst to exploring alternatives to in-person training, clearly new opportunities to improve productivity and deliver value are being discovered. For the half of respondents who have yet to add Web conferencing to their training mix, this might suggest a strong opportunity for both personal growth and professional contribution.



Experienced trainers agree: the value is more than saving money

Survey respondents who indicated experience using Web conferencing for training were asked how Web conferencing has affected their current training offerings and were presented with six options. Of those options, the top business benefit was “reduce travel budgets” (80%).



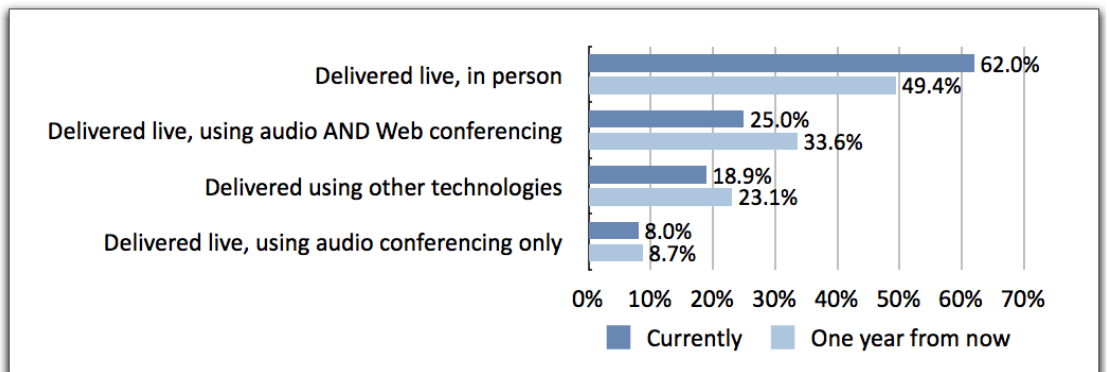
How has Web conferencing affected your current training offerings? We use Web conferencing to... (Respondents asked to select all that apply)

Clearly, however, the value trainers are experiencing also includes their ability to accomplish new things. “Include learners who could not attend before” (77%) suggests that the need to improve productivity is nearly equivalent to the pain of economic pressures.

Given that fewer respondents chose “replace in-person courses” (53%) than “reduce travel budgets” (80%), it is likely that many trainers are blending in-person training with live, online training. Still, the fact that half of trainers with experience using Web conferencing have replaced in-person courses is significant. Add to this the surprising fact that 38% of respondents note that Web conferencing creates new opportunities (“enable new courses that we could not hold before”), and the conclusion is clear: synchronous remote training potentially offers more than just saving money to an organization open to new possibilities.

Web conferencing: the fastest growing alternative to in-person training

Survey respondents were asked to compare how their organizations deliver training today versus what they anticipate one year from now. Overall, in-person training is expected to decrease from 62% of all training delivered today to 50%, while the expected use of all alternatives increased.



How does your organization deliver training courses CURRENTLY vs. ONE YEAR FROM NOW? (Comparison of 2009 data with respondents’ 2010 estimates)





Live training using Web (and audio) conferencing is expected to grow 34% in the next twelve months. Compared to the growth rates of “other technologies” (23% growth) and “audio conferencing only” (9% growth), two observations emerge. First, audio conferencing has long been the option for synchronous remote training, yet its single-modal engagement (aural only) is a significant limitation for many types of training content. Second, self-directed e-learning using on-demand solves the problem of including visual engagement, yet in this survey both are used less and projected to grow at a slower rate than Web conferencing.

As an alternative to in-person training, live training using Web (and audio) conferencing leads both in current usage and in anticipated growth. The survey did not ask respondents to directly identify why they do or do not use specific alternatives. 1080 Group believes the reason is likely a combination of factors, including:

- a. Web conferencing engages multiple senses (versus audio conferencing alone)
- b. Web conferencing affords trainers flexibility in content delivery (versus on-demand e-learning options)
- c. Live training content often requires significantly less preparation and production time (versus on-demand e-learning)

The bottom line: changing times call for changing tactics

The results of this survey suggest that a rapid evolution in training delivery is occurring for trainers in North America. Economic pressure may be a catalyst for change, but the new reality is that Web conferencing is opening up new possibilities as well.

For some trainers, it’s a method to blend learning experiences. For others, it may be an opportunity to control an instructor-led experience in a way that audio conferencing alone never afforded. Whatever the reasons, live training using Web conferencing is the preferred way to simultaneously respond to pressured budgets and pursue improved productivity.

Whatever the reason trainers are choosing Web conferencing for live training, this begs a question:

If trainers can achieve these benefits by adding Web conferencing to their training communications mix, what will happen to the competitiveness of organizations that fail to adapt?



About 1080 Group

1080 Group, LLC, led by industry veteran Roger Courville provides companies with knowledge and skills to better communicate and compete with virtual presentations in Web seminars. The team’s collective experience that includes hundreds of clients, thousands of web seminars, and more than a million web seminar attendees. Learn more about them at www.1080group.com.

About Citrix Online

Citrix Online, a division of Citrix Systems, Inc., is a leading provider of easy-to-use, on-demand applications for Web conferencing and collaboration. Its award-winning solutions include Citrix® GoToMeeting® Corporate, a complete collaboration solution that satisfies all Web conferencing needs from large Webinars to small online meetings. To learn more about Citrix® GoToMeeting® Corporate, please visit www.gotomeeting.com/corp.

