2013 TRAINING INDUSTRY REPORT

Now in its 32nd 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 in May/June 2013, 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. Agencies of the state, local, and federal government were not included in the analysis.

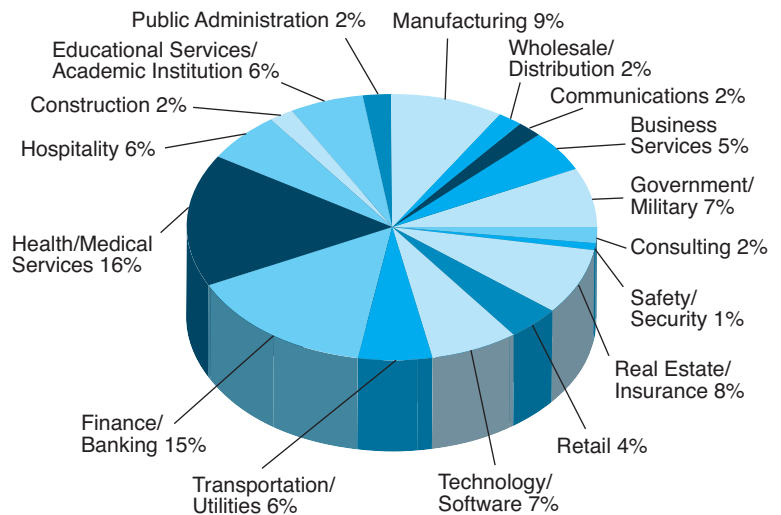The data represents a cross-section of industries and company sizes.

SURVEY RESPONDENTS

Small companies (100-999 employees)	**33%**
Midsize (1,000-9,999 employees)	**39%**
Large (10,000 or more employees)	**28%**
Total respondents	**785**

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).

Public Administration 2%
Manufacturing 9%
Educational Services/ Academic Institution 6%
Wholesale/ Distribution 2%
Construction 2%
Communications 2%
Business Services 5%
Hospitality 6%
Government/ Military 7%
Health/Medical Services 16%
Consulting 2%
Safety/ Security 1%
Real Estate/ Insurance 8%
Finance/ Banking 15%
Retail 4%
Transportation/ Utilities 6%
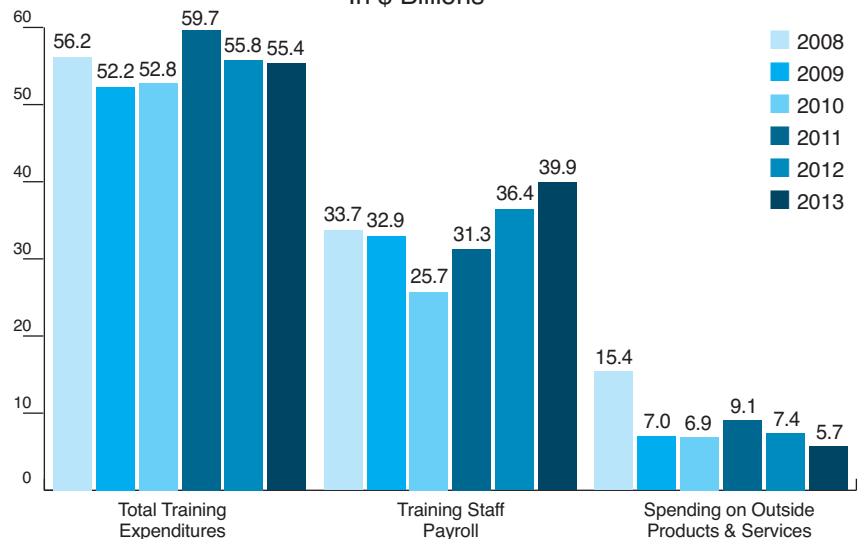Technology/ Software 7%

About Survey Respondents:

- 49% are managers or above in the organization
- 23% are developers or instructional designers
- 25% are mid- to low-level (based on title selection) associates
- 47% determine the need for purchasing products and services
- 20% set the budget
- 22% manage requests for proposals/bids
- 65% recommend the purchase
- 16% have the final purchase decision

In a year roiled by government sequester; deadly wildfires, floods, and tornadoes; and the continued economic toll from Superstorm Sandy, total 2013 U.S. training expenditures—including payroll and spending on external products and services—remained relatively flat at $55.4 billion (down just slightly from $55.8 billion last year). Training payroll increased substantially, from $36.4 billion to $39.9 billion, but spending on outside products and services decreased significantly from $7.4 billion to $5.7 billion.

The training budget figure was calculated by projecting the average training budget to a weighted universe of companies, using a Dun & Bradstreet database available through Hoovers of U.S. organizations with more than 100 employees. It is interesting to note that although small companies have the smallest annual budgets, there are so many of them that they account for 62 percent of the total budget for training expenditures.

Training Expenditures 2008-2013
In $ Billions

Legend: 2008, 2009, 2010, 2011, 2012, 2013

Total Training Expenditures: 56.2, 52.2, 52.8, 59.7, 55.8, 55.4

Training Staff Payroll: 33.7, 32.9, 25.7, 31.3, 36.4, 39.9

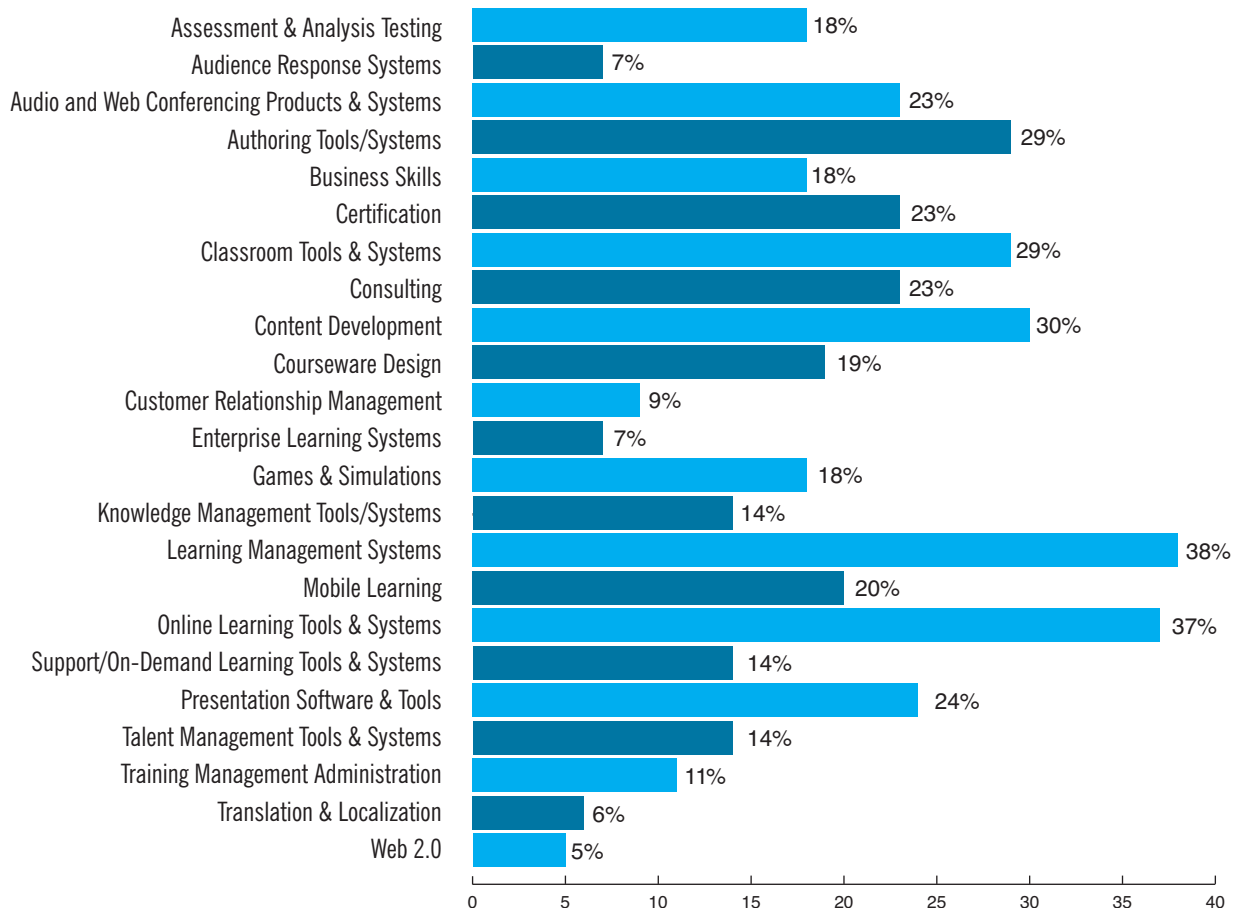Spending on Outside Products & Services: 15.4, 7.0, 6.9, 9.1, 7.4, 5.7

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	Grand Total
Education	$2,350,500	$753,000	$109,650	$920,013
Government/Military	$2,150,000	$1,762,100	$426,250	$1,328,186
Manufacturer/Distributor	$14,235,714	$881,333	$314,681	$2,837,229
Nonprofit	$1,863,333	$1,065,045	$176,455	$588,542
Retail/Wholesale	$3,031,250	$716,500	$110,000	$1,287,400
Services	$29,867,618	$1,341,657	$342,304	$6,343,606
Avg. Across Sizes	$17,587,981	$1,229,55	$301,082	$3,821,314

**Types of Training Products and Services
Intended to Purchase Next Year**

Type	Percent
Assessment & Analysis Testing	18%
Audience Response Systems	7%
Audio and Web Conferencing Products & Systems	23%
Authoring Tools/Systems	29%
Business Skills	18%
Certification	23%
Classroom Tools & Systems	29%
Consulting	23%
Content Development	30%
Courseware Design	19%
Customer Relationship Management	9%
Enterprise Learning Systems	7%
Games & Simulations	18%
Knowledge Management Tools/Systems	14%
Learning Management Systems	38%
Mobile Learning	20%
Online Learning Tools & Systems	37%
Support/On-Demand Learning Tools & Systems	14%
Presentation Software & Tools	24%
Talent Management Tools & Systems	14%
Training Management Administration	11%
Translation & Localization	6%
Web 2.0	5%

Average training expenditures for large companies increased from $11.3 million in 2012 to $17.6 million in 2013, while small companies remained basically flat ($301,082 in 2013 vs. $294,532 in 2012), and midsize companies saw a decrease from $2 million to $1.2 million.
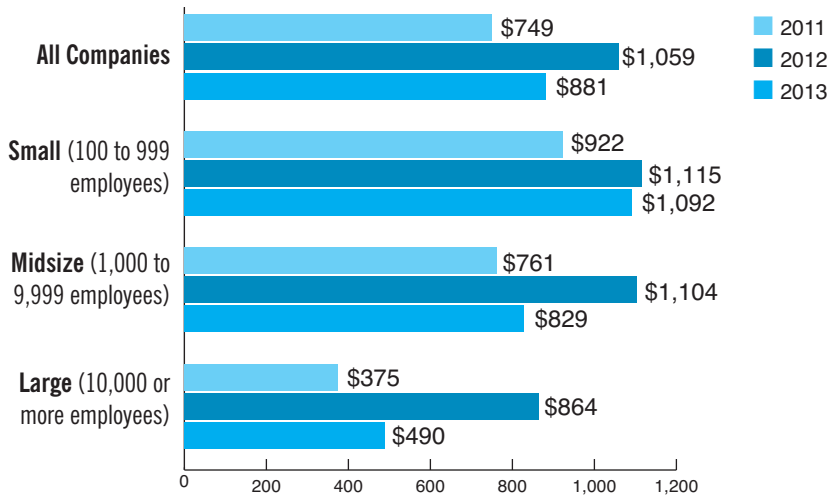
Some 34 percent of organizations said they increased staff from the year before (up from 29 percent in 2012), while 48 percent said the level remained the same (down from 51 percent in 2012). Some 18 percent said it was lower vs. 20 percent in 2012. Large services organizations have the largest personnel costs at an average of $3.4 million. Across all organization types, large companies spend roughly three times as much as midsize ones, and midsize companies spend approximately four times as much as small ones. The average payroll figure for large companies was $2.1 million;

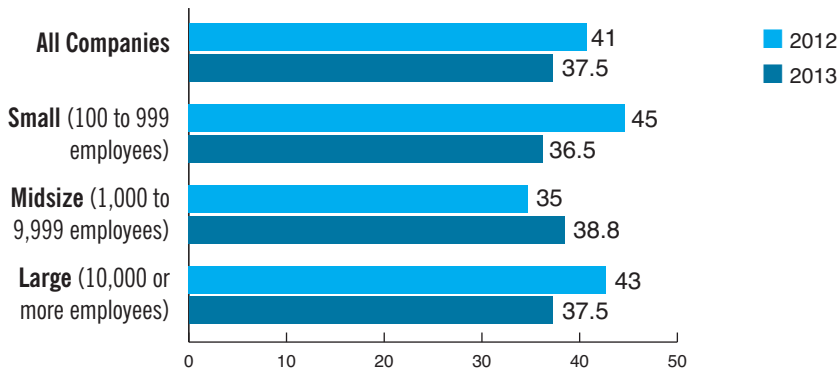for midsize organizations, it was $750,197; for small companies, it was $190,177.

For those who reported an increase in their training staff, the average increase was nine people, one more than in 2012. For those who reported a decrease in their staff, the average decrease was 13 people—down from 18 last year.

Other training expenditures continued to spiral downward to $9.7 billion from $12 billion in 2012. Such expenditures can include travel, training facilities, and equipment. On average, organizations spent 18 percent of their budget or $324,938 (vs. $556,719 last year) on learning tools and technologies. Manufacturers/distributors spent the highest portion of their budgets on tools and technology (an average of 30 percent). Large education organizations and midsize services organizations spent the smallest percentage of their

Training Expenditures per Learner 2011-2013

Legend: 2011, 2012, 2013

Company Size	2011	2012	2013
All Companies	$749	$1,059	$881
Small (100 to 999 employees)	$922	$1,115	$1,092
Midsize (1,000 to 9,999 employees)	$761	$1,104	$829
Large (10,000 or more employees)	$375	$864	$490

(x-axis: 0, 200, 400, 600, 800, 1,000, 1,200)

Hours of Training per Employee 2012-2013

Legend: 2012, 2013

Company Size	2012	2013
All Companies	41	37.5
Small (100 to 999 employees)	45	36.5
Midsize (1,000 to 9,999 employees)	35	38.8
Large (10,000 or more employees)	43	37.5

(x-axis: 0, 10, 20, 30, 40, 50)

training budget on tools and technology (2 and 12 percent, respectively). Looking ahead, 38 percent of organizations plan to purchase learning management systems (vs. 29 percent last year), while 37 percent said they will buy online learning tools and systems (vs. 38 percent last year), followed by content development (30 percent vs. 25 percent last year) and classroom tools/systems and authoring tools/ systems (both at 29 percent vs. 28 percent and 35 percent, respectively, last year).

Overall, on average, companies spent $881 per learner this year compared with $1,059 per learner in 2012. Manufacturers, service providers, and government/military organizations spent about equally, with retail/wholesale companies spending the least. Economy of scale is evident as larger organizations tend to spend less per learner than midsize or small companies.

On average, employees receive 37.5 hours of training per year, three-and-a-half hours less than last year. In general, midsize companies tend to have more hours of training this year at 38.8. Retail/wholesale and services organizations have the highest average number of hours overall (43.3 and 40.4 respectively). Large retailers provide the most number of average hours at 53.8.

Companies continue to devote the bulk of their training expenditures to training non-exempt employees (42 percent, down from 44 percent in 2012). Training for exempt non-managers inched up a bit from 27 percent to 30 percent in 2013.

TRAINING EXPENDITURES

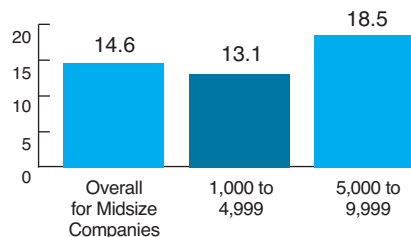### Training Expenditure Allocations—Who Gets Trained?

Executives	Managers, Exempt	Non-Managers, Exempt	Non-Exempt Employees
10%	24%	30%	42%
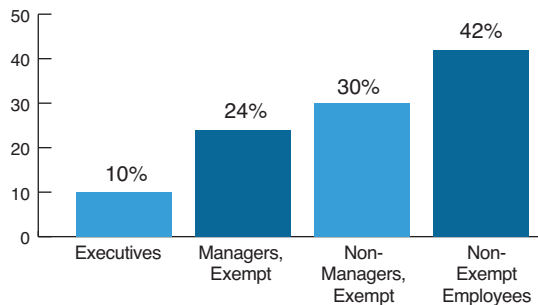
Staff per 1,000 Learners
Midsize Companies

Overall for Midsize Companies	1,000 to 4,999	5,000 to 9,999
14.6	13.1	18.5

Staff per 1,000 Learners
Large Companies

Overall for Large Companies	10,000 to 24,999	25,000 to 49,999	50,000 or more
12.0	12.2	9.9	13.1
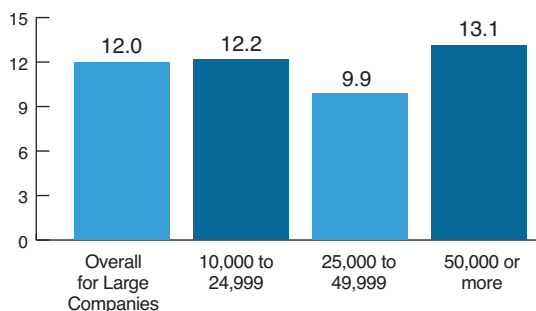
Staff per 1,000 Learners
Small Companies

Overall for Small Companies	100 to 249	250 to 499	500 to 999
21.2	21.2	24.1	18.7
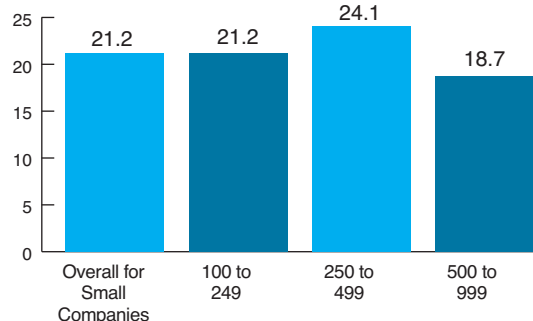
The average training budget for large companies was $17.6 million, while midsize companies allocated an average of $1.2 million, and small companies dedicated an average of $301,082.

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

- Lower 18%
- Higher 34%
- Same 48%
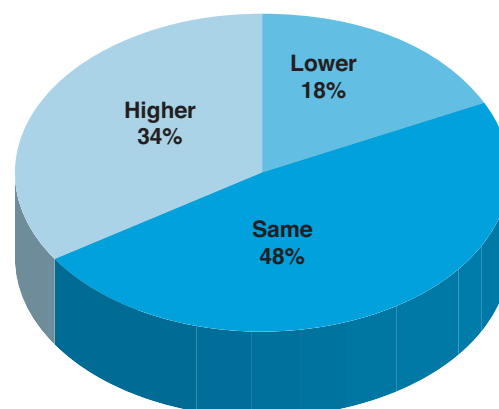
Budget status was almost evenly split, with 41 percent saying their training budget increased and 40 percent saying it remained the same. Some 19 percent reported a decrease in budget. Last year, 35 percent said their budget went up, 43 percent said it remained the same, and 22 percent said it went down. Government/military organizations showed the greatest tendency for training budget cuts, while retailers/wholesalers and manufacturers/distributors showed the largest gains. While large companies showed a similar percentage of decreases and increases (30 percent vs. 37 percent), small and midsize companies showed a higher proportion with increased budgets. The effect is more strongly seen in the small organizations, where almost 4.5 times as many showed an increase than showed a decrease.

Some 37.8 percent saw increases in the 6 to 15 percent range, while 26.9 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 (61 percent vs. 56 percent last year)
• Added training staff (49 percent, same as last year but jumped from the No. 3 to No. 2 reason)
• More learners served (40 percent vs. 52 percent last year)

Like last year, the majority (31 percent) of respondents reported budget decreases between 6 and 15 percent. Some 56 percent chose "other" as the reason for the decrease, citing "Congressional mandate/sequester," "budget cuts for training tools," "decreased funding" (nonprofit), and "impending merger," among others. This was followed by:

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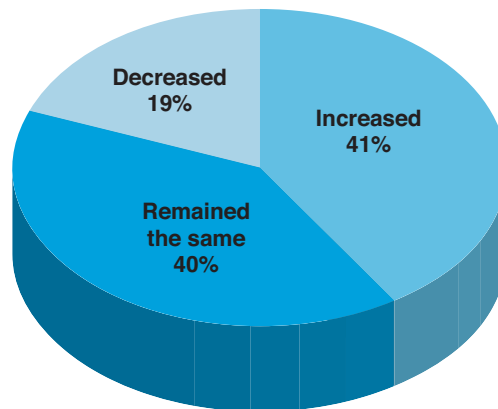
Budget Change by Industry
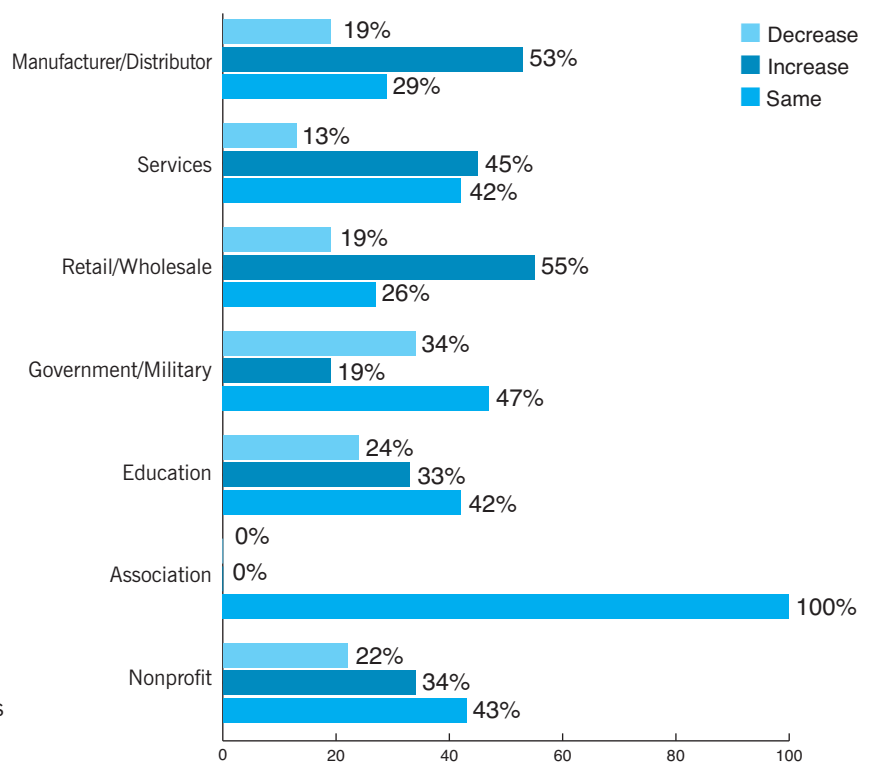
TRAINING BUDGETS

- Staff reductions (52 percent; up from 45 percent)
- Attended fewer outside learning events (50 percent; up from 40 percent and jumping from the No. 4 to No. 3 reason)
- Budget adjustments to reflect lower costs (47 percent; up from 46 percent last year)

Like the last two 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 management/supervisory training at $345,051, onboarding ($316,983), and mandatory/compliance training ($228,711).

The most important priorities for training in terms of allocating resources in 2013 are: increasing the effectiveness of training programs (32 percent vs. 26 percent last year) followed by reducing costs/improving efficiency (20 percent vs. 26 percent last year), and increasing learner usage of training programs (14 percent vs. 15 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

Range	Percent
More Than 25%	22%
16% to 25%	13%
6% to 15%	38%
1% to 5%	27%

Small Companies

Range	Percent
More Than 25%	29%
16% to 25%	15%
6% to 15%	35%
1% to 5%	21%

Midsize Companies

Range	Percent
More Than 25%	16%
16% to 25%	11%
6% to 15%	43%
1% to 5%	30%

Large Companies

Range	Percent
More Than 25%	17%
16% to 25%	14%
6% to 15%	36%
1% to 5%	33%
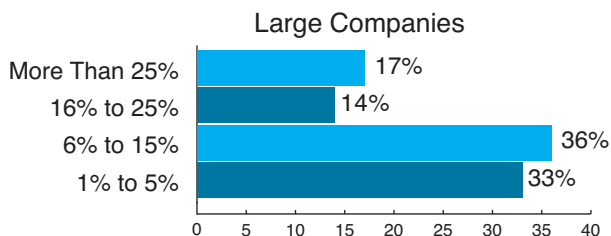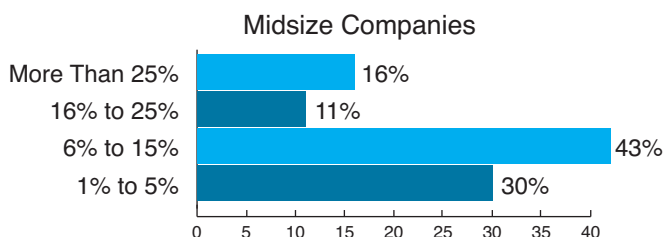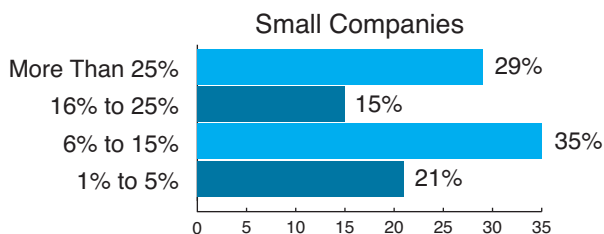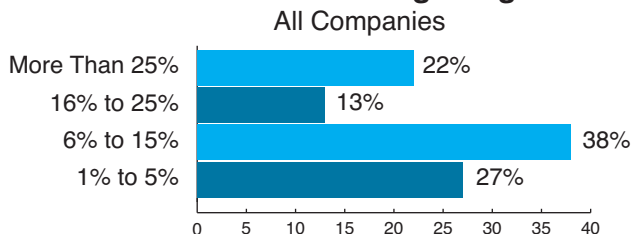
Why Did Your Budget Increase?

Reason	Percent
Added Training Staff	49%
Increased Number of Learners Served	40%
Increased Scope of Training	61%
Attended More Outside Learning Events (conferences/seminars)	20%
Increased Outside Trainer/Consultant Investment	14%
Purchased New Technologies/Equipment	38%
Budget Adjusted to Reflect Higher Costs	19%
Other	6%
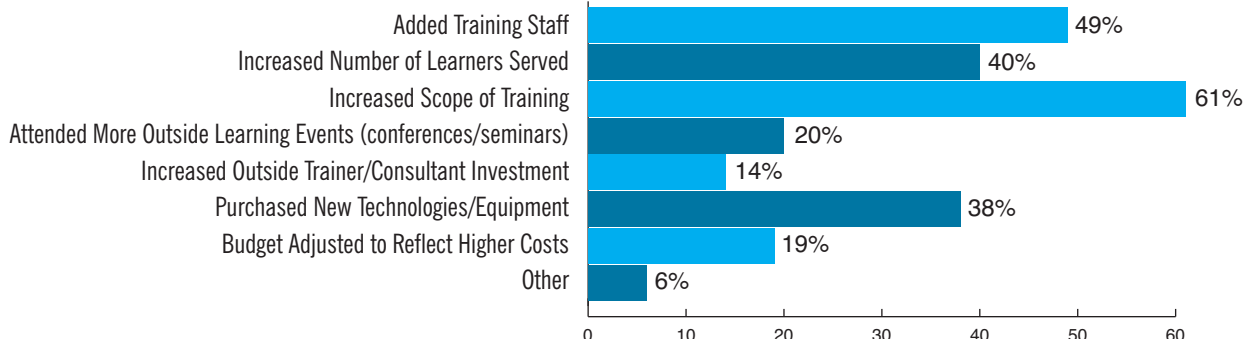
How Much Did Your Training Budget Decrease?

All Companies

Category	Percentage
More Than 25%	24%
16% to 25%	21%
6% to 15%	31%
1% to 5%	24%

Small Companies

Category	Percentage
More Than 25%	32%
16% to 25%	11%
6% to 15%	46%
1% to 5%	11%

Midsize Companies

Category	Percentage
More Than 25%	25%
16% to 25%	19%
6% to 15%	28%
1% to 5%	28%

Large Companies

Category	Percentage
More Than 25%	17%
16% to 25%	32%
6% to 15%	24%
1% to 5%	27%
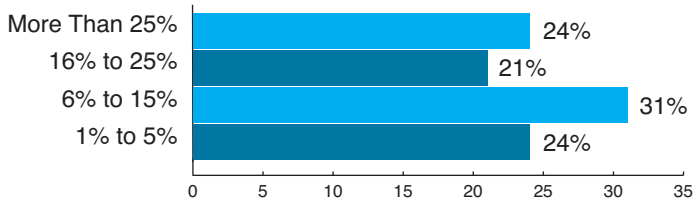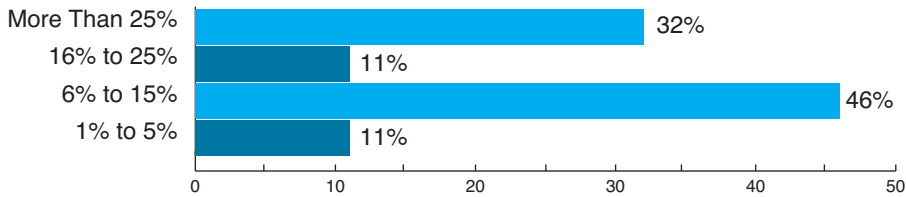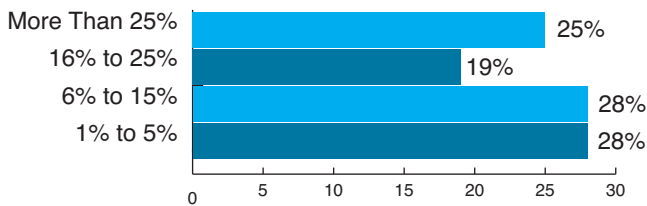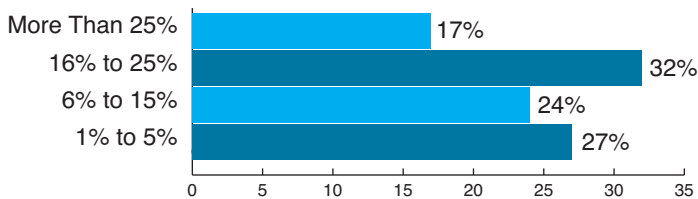
Why Did Your Budget Decrease?

Reason	Percentage
Reduced Training Staff	52%
Decreased Number of Learners Served	42%
Decreased Scope of Training	43%
Attended Fewer Outside Learning Events (conferences/seminars)	50%
Decreased Outside Trainer/Consultant Investment	43%
Budget Adjusted to Reflect Lower Costs	47%
Other	56%
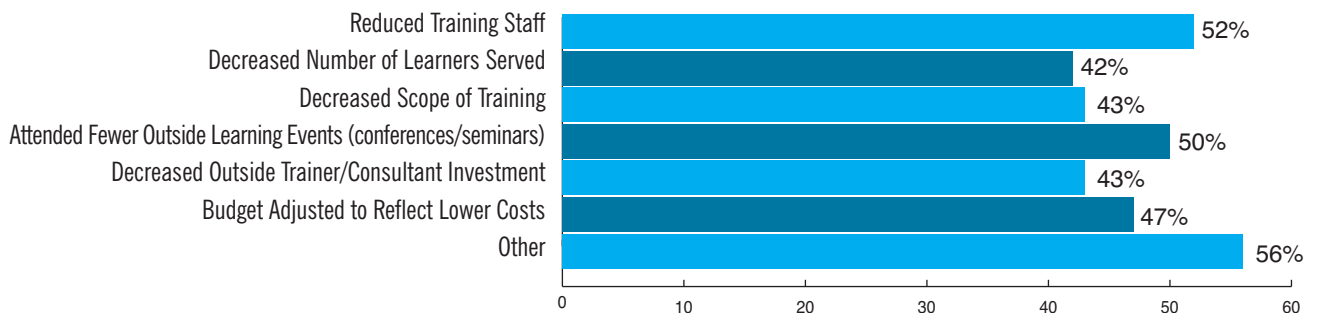
TRAINING BUDGETS

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	16%	53%	7%	24%
Management/Supervisory Training	29%	54%	8%	9%
Interpersonal Skills (e.g., communication, teamwork)	20%	64%	8%	8%
IT/Systems Training (e.g., enterprise software)	19%	55%	9%	17%
Desktop Application Training	8%	62%	11%	19%
Customer Service Training	20%	54%	9%	17%
Sales Training	21%	39%	5%	35%
Mandatory or Compliance Training	18%	66%	9%	7%
Profession/Industry-Specific (engineering, accounting, etc.)	15%	57%	10%	18%
Onboarding	22%	51%	9%	18%

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

TRAINING DELIVERY

Technology usage for training delivery crept up in 2013. Nearly 44 percent of training hours were delivered by a stand-and-deliver instructor in a classroom setting—down a bit from the 45.2 percent reported last year.

- 28.3 percent of hours are delivered with blended learning techniques, up a bit from 27 percent last year.
- 25.9 percent of hours are delivered via online or computer-based technologies, up slightly from 24.7 percent last year. Virtual classroom/Webcast accounted for nearly 16 percent of hours delivered, up from 13 percent last year.
- 1.9 percent of training hours are delivered via mobile

devices, up from 1 percent in 2012, while social learning accounted for 3.3 percent of hours, up from 1.1 percent last year.

Small (48.6 percent) and midsize (41.8 percent) companies continue to rely on instructor-led delivery methods more so than large companies (37.7 percent). Blended learning is fairly even across companies of all sizes, ranging between 20.7 percent for large companies and 35.1 percent for small ones. Like last year, large companies appear to be focusing on online or computer-based methods (28.1 percent vs. an average of 25.3 percent for small and

Training Delivery Methods by Company Size 2013

Company Size	Blended Learning	Instructor-Led Classroom Only	Virtual Classroom/Webcast Only	Online or Computer-Based Methods Only	Mobile Only	Social Learning Only
Small (10 to 999 employees)	35.1%	48.6%	14.9%	23.9%	1.8%	2.5%
Midsize (1,000 to 9,999 employees)	25.3%	41.8%	15.4%	26.7%	1.9%	2.9%
Large (10,000 or more employees)	20.7%	37.7%	18.5%	28.1%	1.8%	5.7%

■ 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

midsize companies).

Mandatory or compliance training continues to be done mostly online, with 72 percent of organizations doing at least some of it online and 21 percent entirely online (down from 23 percent last year). Online training also often is used for desktop application training (56 percent, down from 58 percent last year) and IT/systems application training (58 percent, the same as last year). Online training is least used for executive development (34 percent, up from 28 percent last year), sales training (30 percent), and onboarding (29 percent).

Of the learning technologies presented, the most often used include:

• Virtual classroom/Webcasting/video broadcasting (78 percent, up from 70 percent last year). This replaced

learning management systems as the technology used most often.
• Learning management system (LMS) (74 percent, up from 73 percent)
• Rapid e-learning tool (49 percent, down from 56 percent last year).

The delivery methods least often used for training remain the same as last year:

• Podcasting at 19 percent (up from 17 percent last year)
• Learning content management system (LCMS) at 26 percent (up from 22 percent last year)
• Online performance support (EPSS) or knowledge management system at 25 percent (up from 23 percent in 2012)

Online Method Use for Types of Training

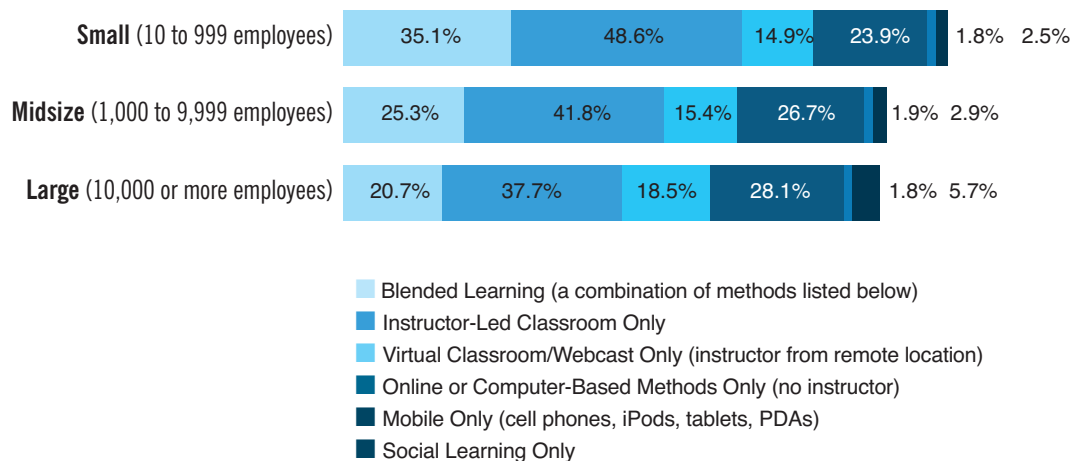| Type of Training	No Online	A Few Online Programs	Some Online	Mostly Online	All Online
Executive Development	34%	31%	28%	6	1%
Management/Supervisory Training	23%	30%	35%	11%	1%
Interpersonal Skills (e.g., communication)	27%	28%	32%	11%	2%
IT/Systems Training (e.g., enterprise software)	17%	25%	31%	23%	4%
Desktop Application Training	19%	25%	29%	21%	6%
Customer Service Training	28%	29%	33%	9%	2%
Sales Training	30%	27%	33%	9%	1%
Mandatory or Compliance Training	13%	15%	17%	34%	21%
Profession/Industry-Specific (e.g., engineering)	24%	29%	31%	13%	3%
Onboarding	28%	30%	27%	12%	3%

Technology usage for training delivery crept up a bit in 2013. Nearly 44 percent of training hours were delivered by a stand-and-deliver instructor in a classroom setting. That figure is down slightly from the 45.2 percent reported last year.

Learning Technologies Current Usage All Companies

Technology	Use currently	Do not use	Not sure
Podcasting	19%	73%	8%
Online Performance Support or Knowledge Management System	25%	61%	14%
Rapid E-Learning Tool (PowerPoint conversion tool)	49%	41%	10%
Application Simulation Tool	40%	53%	7%
Virtual Classroom/Webcasting/Video Broadcasting	78%	1%	21%
Learning Content Management System (LCMS)	26%	61%	13%
Learning Management System (LMS)	74%	22%	4%
Mobile Applications	21%	70%	9%

■ Use currently   ■ Do not use   ■ Not sure

Small Companies

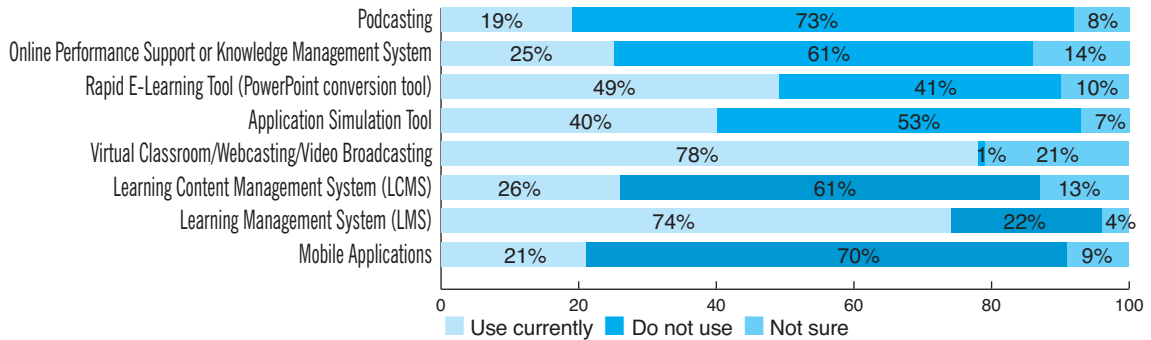| Technology	Use currently	Do not use	Not sure
Podcasting	17%	78%	5%
Online Performance Support or Knowledge Management System	12%	78%	10%
Rapid E-Learning Tool (PowerPoint conversion tool)	32%	59%	9%
Application Simulation Tool	22%	71%	7%
Virtual Classroom/Webcasting/Video Broadcasting	65%	1%	34%
Learning Content Management System (LCMS)	16%	74%	10%
Learning Management System (LMS)	58%	36%	6%
Mobile Applications	17%	75%	8%

■ Use currently   ■ Do not use   ■ Not sure

Midsize Companies

Technology	Use currently	Do not use	Not sure
Podcasting	20%	72%	8%
Online Performance Support or Knowledge Management System	27%	58%	15%
Rapid E-Learning Tool (PowerPoint conversion tool)	61%	30%	9%
Application Simulation Tool	49%	45%	6%
Virtual Classroom/Webcasting/Video Broadcasting	85%	1%	14%
Learning Content Management System (LCMS)	35%	53%	12%
Learning Management System (LMS)	82%	16%	2%
Mobile Applications	21%	68%	11%

■ Use currently   ■ Do not use   ■ Not sure

Large Companies

Technology	Use currently	Do not use	Not sure
Podcasting	24%	68%	8%
Online Performance Support or Knowledge Management System	46%	35%	19%
Rapid E-Learning Tool (PowerPoint conversion tool)	59%	27%	14%
Application Simulation Tool	53%	38%	9%
Virtual Classroom/Webcasting/Video Broadcasting	86%	1%	13%
Learning Content Management System (LCMS)	28%	52%	20%
Learning Management System (LMS)	88%	9%	3%
Mobile Applications	26%	64%	10%

■ Use currently   ■ Do not use   ■ Not sure

2013 saw a sizeable decrease in the average expenditure for training outsourcing: $140,345, down from $592,679 in 2012. Large companies on average spent $476,667 vs. $140,918 for midsize companies and $36,905 for small ones. An average of 8 percent of the total training budget was spent on outsourcing in 2013 vs. 23 percent in 2012.

On average, 27 percent of companies completely outsource LMS operations/hosting (vs. 23 percent last year). LMS administration and learner support, however, continue to be mostly handled in-house, with only a small amount (7 percent and 2 percent, respectively) mostly or completely outsourced.

- Outsourcing LMS operations/hosting decreased to 48 percent from 55 percent in 2012.
- Instruction/facilitation again is the most often considered for some degree of outsourcing, up from 49 percent last year to 56 percent this year.

The level of outsourcing is expected to stay relatively steady in 2014—some 81 percent of organizations said they expect to stay the same in the outsourcing area. And the percentage of companies expecting to increase use is almost exactly offset by those organizations expecting to decrease outsourcing for the same functions. In learner support, twice as many companies say they will be doing less than those that say they will be doing more. LMS hosting is just the opposite, with twice as many saying they will increase outsourcing.

For LMS administration, large companies will be doing less, and midsize companies will be doing more. Midsize companies also show an imbalance in instruction/facilitation, with more saying they anticipate less outsourcing next year.
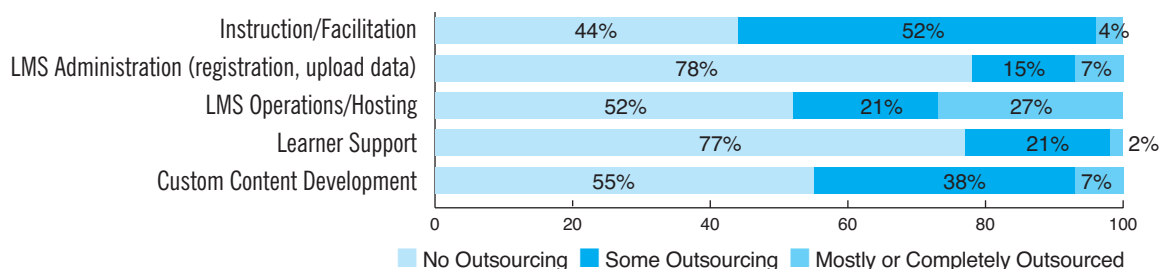
> 2013 saw a sizeable decrease in the average expenditure for training outsourcing: $140,345, down from $592,679 in 2012. An average of 8 percent of the total training budget was spent on outsourcing. The level of outsourcing is expected to stay relatively steady in 2014.

Extent of Outsourcing All Companies

Category	No Outsourcing	Some Outsourcing	Mostly or Completely Outsourced
Instruction/Facilitation	44%	52%	4%
LMS Administration (registration, upload data)	78%	15%	7%
LMS Operations/Hosting	52%	21%	27%
Learner Support	77%	21%	2%
Custom Content Development	55%	38%	7%

■ No Outsourcing ■ Some Outsourcing ■ Mostly or Completely Outsourced

Extent of Outsourcing Small Companies

	No Outsourcing	Some Outsourcing	Mostly or Completely Outsourced
Instruction/Facilitation	44%	52%	4%
LMS Administration (registration, upload data)	78%	15%	7%
LMS Operations/Hosting	57%	19%	24%
Learner Support	81%	19%	0%
Custom Content Development	63%	30%	7%

Midsize Companies

	No Outsourcing	Some Outsourcing	Mostly or Completely Outsourced
Instruction/Facilitation	46%	51%	3%
LMS Administration (registration, upload data)	80%	14%	6%
LMS Operations/Hosting	48%	23%	29%
Learner Support	74%	23%	3%
Custom Content Development	53%	40%	7%

Large Companies

	No Outsourcing	Some Outsourcing	Mostly or Completely Outsourced
Instruction/Facilitation	40%	55%	5%
LMS Administration (registration, upload data)	74%	17%	9%
LMS Operations/Hosting	51%	19%	30%
Learner Support	74%	20%	6%
Custom Content Development	41%	49%	10%

In 2014, for LMS administration, large companies will outsource less, and midsize companies will outsource more. But more midsize companies say they anticipate less outsourcing in instruction/facilitation next year.

Projected Use of Outsourcing All Companies

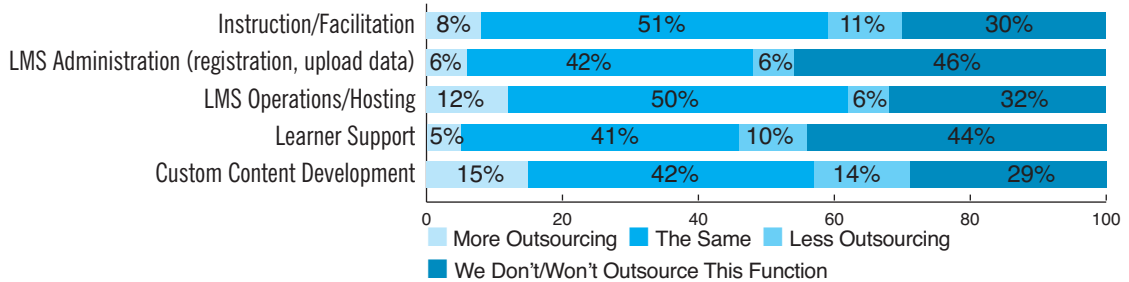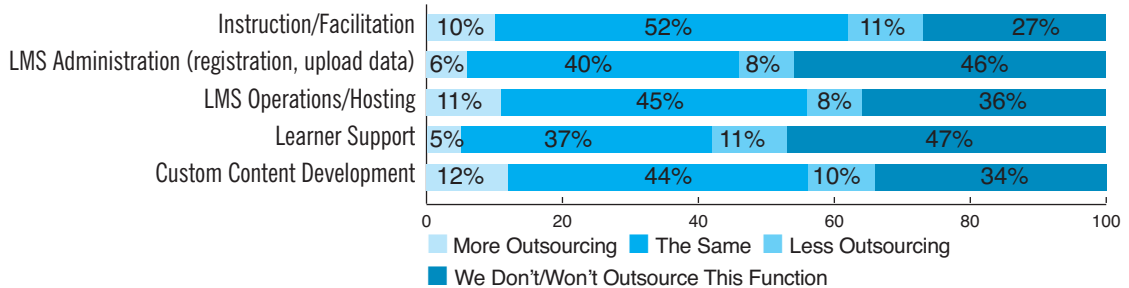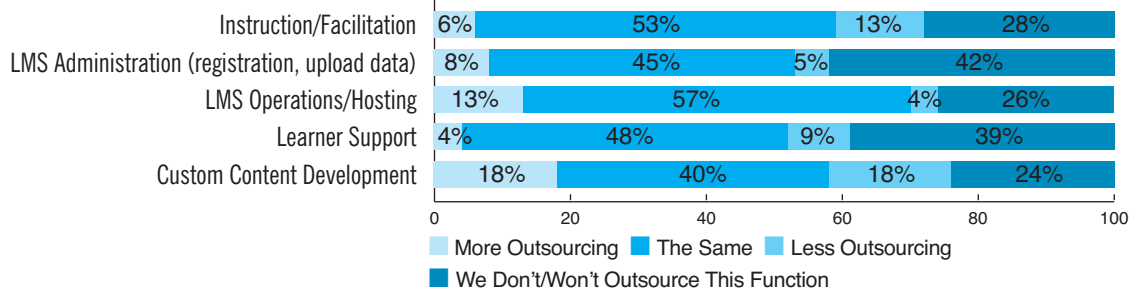| Function	More Outsourcing	The Same	Less Outsourcing	We Don't/Won't Outsource This Function
Instruction/Facilitation	8%	51%	11%	30%
LMS Administration (registration, upload data)	6%	42%	6%	46%
LMS Operations/Hosting	12%	50%	6%	32%
Learner Support	5%	41%	10%	44%
Custom Content Development	15%	42%	14%	29%

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

Small Companies

Function	More Outsourcing	The Same	Less Outsourcing	We Don't/Won't Outsource This Function
Instruction/Facilitation	10%	52%	11%	27%
LMS Administration (registration, upload data)	6%	40%	8%	46%
LMS Operations/Hosting	11%	45%	8%	36%
Learner Support	5%	37%	11%	47%
Custom Content Development	12%	44%	10%	34%

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

Midsize Companies

Function	More Outsourcing	The Same	Less Outsourcing	We Don't/Won't Outsource This Function
Instruction/Facilitation	6%	53%	13%	28%
LMS Administration (registration, upload data)	8%	45%	5%	42%
LMS Operations/Hosting	13%	57%	4%	26%
Learner Support	4%	48%	9%	39%
Custom Content Development	18%	40%	18%	24%

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

Large Companies

Function	More Outsourcing	The Same	Less Outsourcing	We Don't/Won't Outsource This Function
Instruction/Facilitation	9%	44%	8%	39%
LMS Administration (registration, upload data)	3%	38%	6%	53%
LMS Operations/Hosting	11%	48%	6%	35%
Learner Support	6%	35%	12%	47%
Custom Content Development	18%	39%	15%	28%

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