STAYING AHEAD OF THE TECHNOLOGY CURVE NOW AND IN THE FUTURE

DDLS CUSTOMER SURVEY
August 2020

ddls

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INTRODUCTION

In just a few short decades, Information Technology has evolved from the back office to the front office and is now an essential component in nearly every aspect of business and personal life.

Staple technologies such as the cloud have created enormous potential for innovation and growth, but to fully realise this potential, organisations need highly skilled staff with the capability to manage complex and ever-evolving IT environments.

However, skilled IT staff are in short supply - as more and more companies have rapidly embraced digital transformation, an acute skills shortage has emerged, creating fierce competition between organisations for skilled workers[1] .

The most effective way for organisations to tackle these skills gaps is by investing in training and certification for their staff. 93% of IT decision makers agree that the value certified professionals bring to their organisations far outweighs the cost of training them[2].

DDLS recently commissioned a survey to determine the current trends in IT training and certification, and the key opportunities and challenges for delivering training to the market in the next few years.

This research paper provides a snapshot of the most in demand training areas, as well as the perceived benefits of training and the barriers to accessing it. It also explains customers' and organisations' perception of the role of training partners, and the qualities they are looking for when choosing a training partner.

1. Deloitte Access Ecnonomics, Digital Pulse Report 2019
2. Global Knowledge, 2019 IT Skills and Salary Report

METHODOLOGY

METHODOLOGY

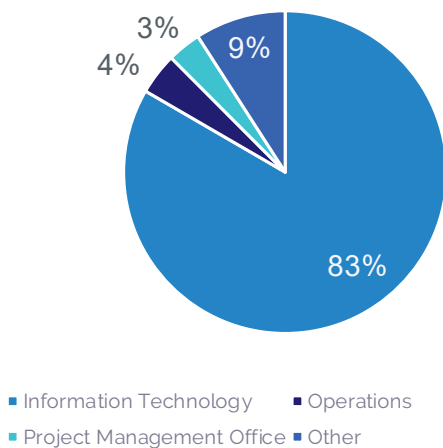A total of 392 DDLS customers from 270 Australian companies responded to the online survey.

Respondents were not targeted in any way – the survey was sent out to all personal and business customers of DDLS, and this report represents the 392 respondents who voluntarily participated in the survey.

Respondents at Glance

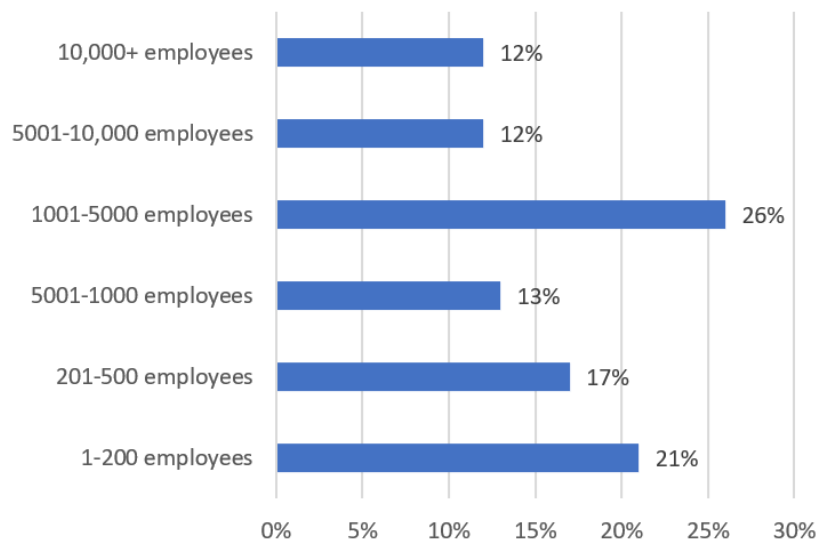|			
392	**270+**	**5.5X**	**Targeted**
Customers surveyed	Companies surveyed	More responses than prior survey in 2017	Primary booking contact, or decision makers

Respondents were asked to identify which area of their organisation they work in, with the majority of respondents working in the ICT department (83%).

When asked to identify the number of employees in their organisation, 50% of all respondents indicated they are employed by large corporations with over 1000+ employees.

Area of Organisation

3%
4%
9%
83%

- Information Technology
- Operations
- Project Management Office
- Other

No. of employees in organisation

10,000+ employees	12%
5001-10,000 employees	12%
1001-5000 employees	26%
5001-1000 employees	13%
201-500 employees	17%
1-200 employees	21%

0%   5%   10%   15%   20%   25%   30%

When asked to describe their current job role, the majority of respondents identified themselves as either a professional (41%) or in management (32%). A minority of participants identified their job roles as technician (15%), Senior/Executive Management (4%) or Other (8%).

Job Role

- ■ Professional
- ■ Management
- ■ Technician
- ■ Senior/Executive Management
- ■ Other
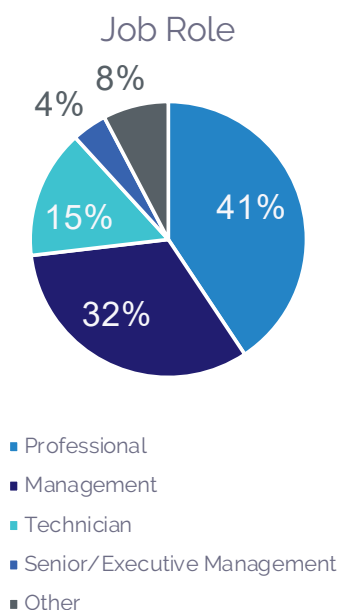
The respondents are distributed across a vast range of industries. The majority of respondents actually identified their industry as 'Other'. The next most-popular choice was 'Public Sector – State Government' (13%), followed closely by 'Education and Training' (11%) and 'Information Media and Telecom' (10%)'.

Whilst the spread of respondents appears to be in very close margins, it is worth noting that 'Public Sector - Federal Government' and 'Public Sector – Local Government' also accounted for 6% and 5% of respondents respectively; therefore, with these two categories combined with the 'Public Sector – State Government' category, almost one quarter of all respondents were employed in the 'public sector' collectively.

| In which industry is your organisation?	Total %
Public Sector - State Government	13%
Education and Training	11%
Information Media and Telecom	10%
Financial and Insurance Services	9%
Healthcare and Social Assistance	6%
Public Sector - Federal Government	6%
Public Sector - Local Government	5%
Mining	5%
Electricity, Gas, Water and Waste Services	5%
Professional, Scientific and Technical Services	4%
Professional Services	3%
Construction	3%
Charity/Not for Profit	3%
Media and Entertainment	3%
Other	16%

QUALITATIVE FINDINGS

ICT SPENDING IN ORGANISATIONS

Respondents were asked if in the next 12 months they expected their organisation to invest more, the same or less money in ICT Projects than the previous period. 48% of respondents expected an increase in spending on ICT Projects, while 37% expected spending to remain static and a minority of 15% expected a reduction in spending on ICT projects.

When asked if in the next 12 months they expected their organisations to invest more, the same or less money into ICT training, only 34% of respondents said they expected an increase in spending, while 51% of respondents expected spending would remain static and 15% expected a reduction in spending.

These statistics indicate that there is a gap in some organisations between the expenditure on ICT Projects, and the expenditure on training employees in ICT processes. There may be a number of reasons for not investing as heavily into training, which will be explored further in the report. This finding is supported by the notion of a critical skills gap emerging in some areas of ICT, in particular cloud computing and cybersecurity, which is expected to increase significantly without more investment into ICT training.

Next 12 months spend expectations on ICT projects
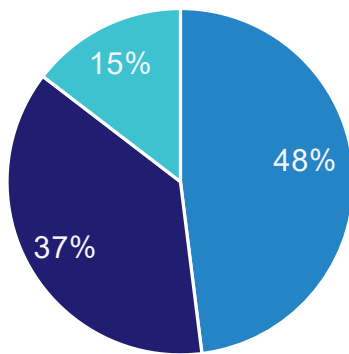
■ More ■ The Same ■ Less

Next 12 months spend expectations on ICT training
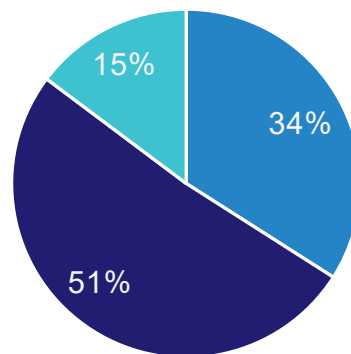
■ More ■ The Same ■ Less

MOST IN-DEMAND TRAINING AREAS

Respondents were asked to name the top three training needs they would like to address this year.

The top choices were:

- IT Infrastructure and Networks (21%)
- Cloud Computing and Virtualisation (17%)
- ITIL (IT Service Management) and DevOps (16%).
- Cybersecurity (9%)

When asked about their second preference of training needs they would like to address, the top three choices featured in the same order:

- IT Infrastructure and Networks (15%)
- Cloud Computing and Virtualisation (14%),
- ITIL (IT Service Management) and DevOps (13%)
- Cybersecurity (11%).

In a separate survey DDLS conducted in June 2020, respondents were asked which areas they planned to focus their learning on in the next 12 months. ITIL was the most popular choice (41%), followed closely by cloud computing and virtualisation (39%), Cybersecurity (33%) and IT Infrastructure and networks (32%).
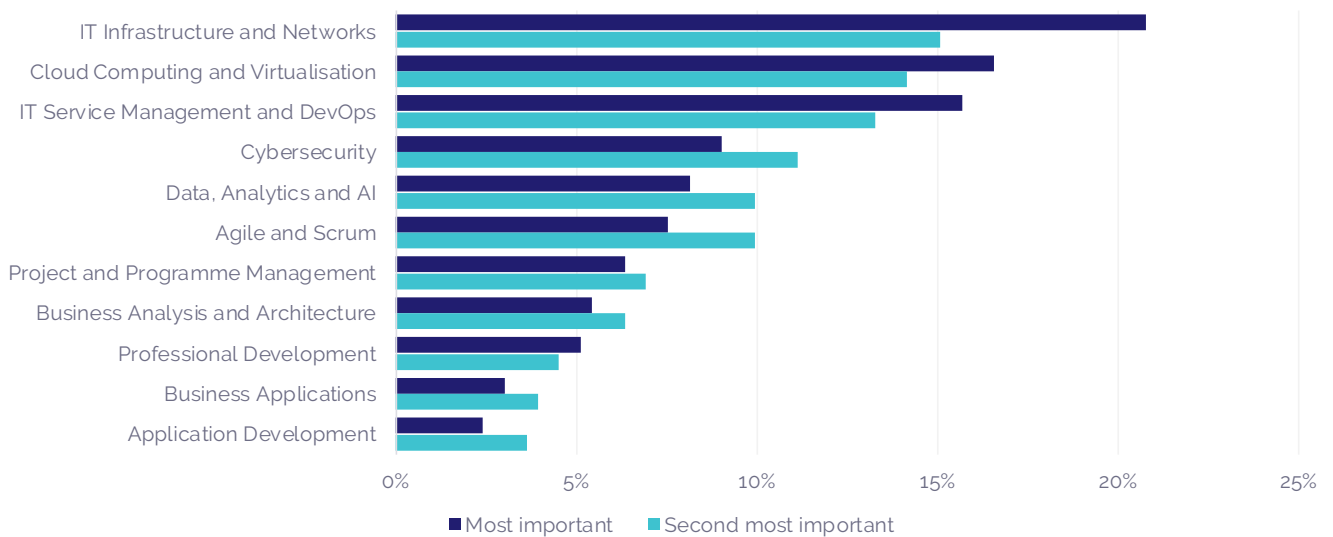
TRAINING PREFERENCE POST COVID-19

A comparison between the two surveys indicates that ITIL (a common IT Service Management Framework) has grown in popularity since the onset of COVID-19 and social distancing measures, as has cybersecurity training. This may be a result of the increase in remote working, which has significantly affected IT Operations and cyber security practices in many organisations. Cloud and IT infrastructure/network courses have remained popular choices.

ANSWER CHOICES	RESPONSES	
ITIL	41.25%	283
Cloud computing & virtualisation	38.92%	267
Cybersecurity	33.09%	227
IT Infrastructure & networks	32.07%	220
Management & leadership	21.14%	145
Project or programme management	17.64%	121
Agile & Scrum	16.76%	115
Data, analytics & AI	15.74%	108

CYBERSECURITY TRAINING

When asked how important cybersecurity awareness training was for all employees in the organisation, the majority of respondents (77%) said it was 'Extremely important' or 'Very important; 19% said it was 'Somewhat important' and a minority of 5% said it was 'Not so important' or 'Not at all important'
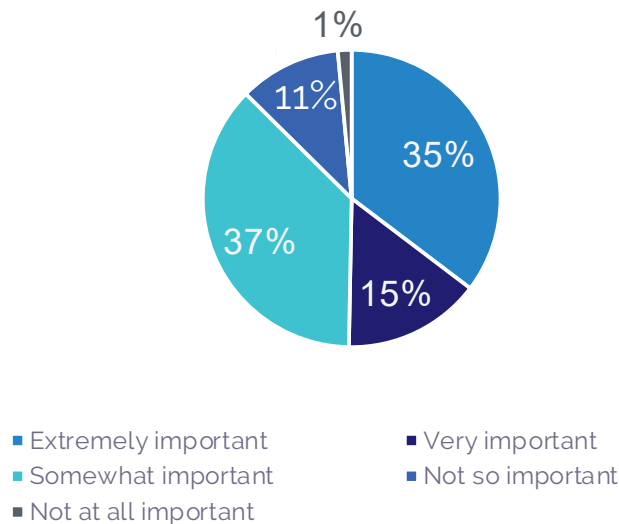
Cybersecurity Awareness Training to all employees in the organisation

- Extremely important
- Somewhat important
- Not at all important
- Very important
- Not so important
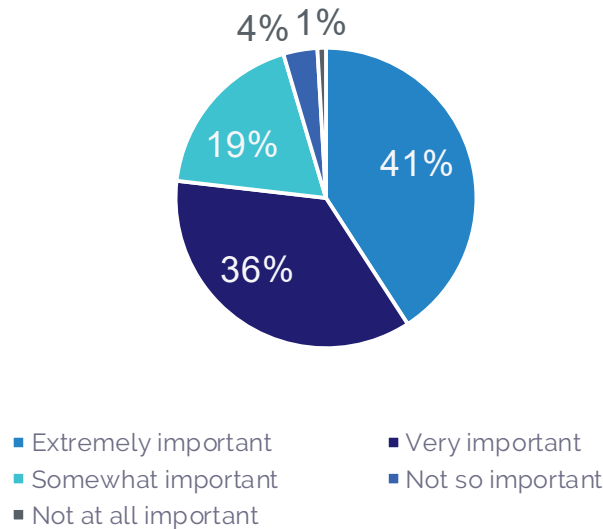
When asked how important it was for their organisation to have employees certified in Cybersecurity, 50% of the respondents said that it was 'Extremely important' or 'Very important', while 37% said it was 'Somewhat important', 11% said it was 'Not so important' and 1% said it was 'Not at all important'. It is interesting to note that the majority of respondents place high importance on having certified employees, yet cybersecurity didn't make the top three training investment areas for organisations.

This gap points to the huge skills shortage in the cybersecurity industry in Australia - with the number of unfilled cyber security jobs predicted to reach 3.5 million by 2021[3]. Furthermore, it could indicate that while some form of cybersecurity awareness training appears crucial for all respondents, not as many are prepared to invest in specialised cybersecurity certification, which can be costly and time consuming.

Importance of having employees certified in Cybersecurity

- Extremely important
- Somewhat important
- Not at all important
- Very important
- Not so important

3. Cybersecurity Ventures, Cybersecurity Jobs Report 2017

When respondents were asked what cybersecurity certification they valued the most, 26% chose CISSP, 17% chose the CompTIA Security+, 7% chose CISM, 6% chose CCSP, and 20% chose other. 23% of respondents said, 'I don't value certification'.

The majority of respondents indicated they valued one certification or another, proving there is inherent value in certification in most organisations.

Most Valued Cybersecurity Certification

23%
26%
17%
20%
6%   7%

- ■ CISSP
- ■ CISM
- ■ Other
- ■ CompTIA Security+
- ■ CCSP
- ▪ I don't value certification
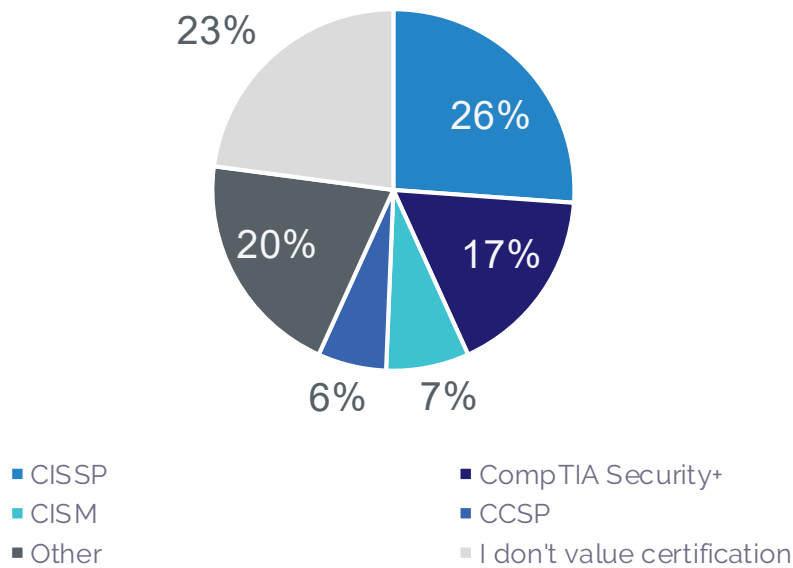
MAIN DRIVERS FOR SENDING STAFF ON TRAINING

Organisations were asked to identify their main drivers for sending staff on training courses. Respondents were asked to select the most appropriate answers and were allowed to choose more than one option.

The top four reasons to send staff on training were career progression (74%), increased productivity (68%), increased ability to incorporate new technologies into the business (66%) and to increase job satisfaction and morale (57%).
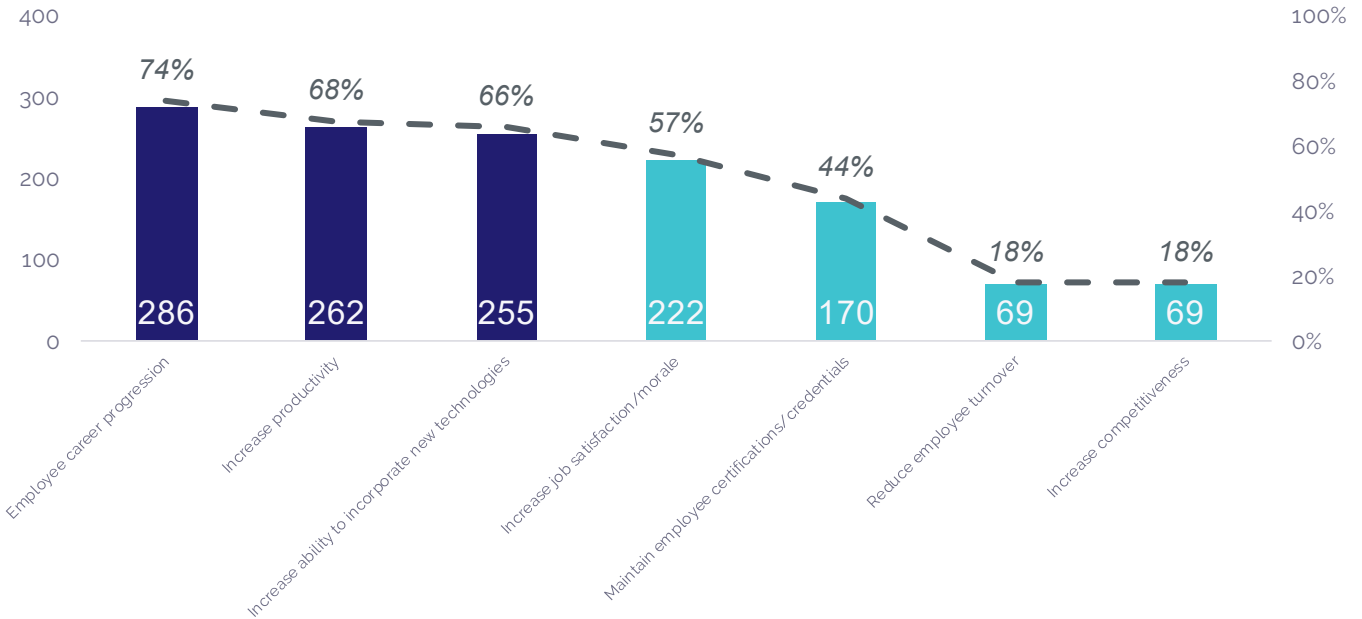
BARRIERS TO ACCESSING TRAINING

The top two barriers to sending staff on training were budget constraints (79%) and giving staff time out of the office (59%). These two barriers topped the list by a significant margin. Other barriers to sending staff on training were a lack of perceived value of training (19%), lack of required training available (12%) and risk of staff leaving (3%).
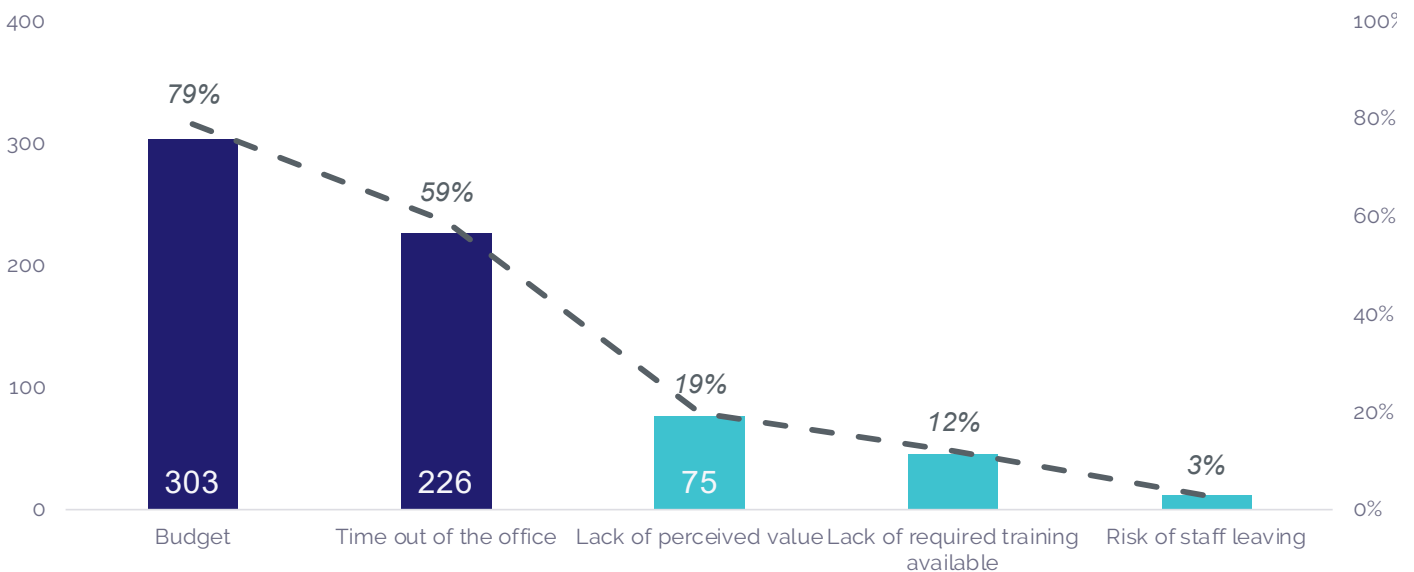
OPPORTUNITIES
IN THE MARKET

PREFERRED TRAINING FORMATS

Respondents reported the most effective training method to be instructor-led training in the classroom (63%), highlighting classroom training is still students' first preference. However, a significant number of respondents chose 'Blended (Mix of Instructor-led and Online training).

The preference for instructor-led training could be for a number of reasons. Open ended responses described instructor-led training as:

Having "greater engagement with instructor and superior class discussion"

"Allows staff to be away from BAU Tasks and, hence, improve focus on learning".

However, those with a preference for Blended training (mix of instructor-led and online) also reported several benefits:

"Gives flexibility and possibility to still engage with Instructor"

"Each modality compliments and reinforces each other"
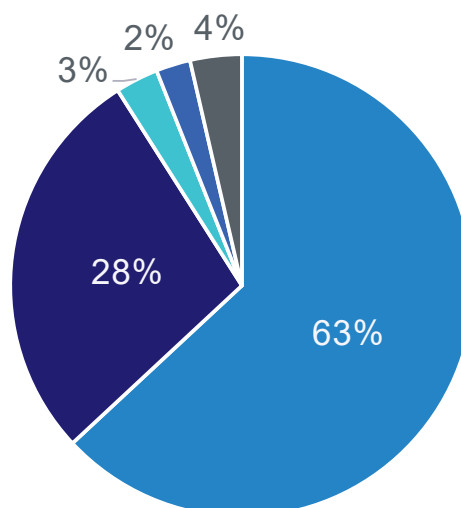
"Better value of time and money"

"Allows self-paced learning on technical skills and real cases examples from classrooms"

- Instructor-led Training in Classrom
- Blended (Mix of Instructor-led and Online Training)
- Virtual Instructor-led Training from Anywhere
- E-Learning (Self Paced Online Training)
- No preference

The anecdotal evidence provided, combined with the fact that one of the main barriers to accessing training is giving staff the time out of office, indicates there is an opportunity to provide more blended or fully online training in the future to satisfy students' changing needs and requirements.
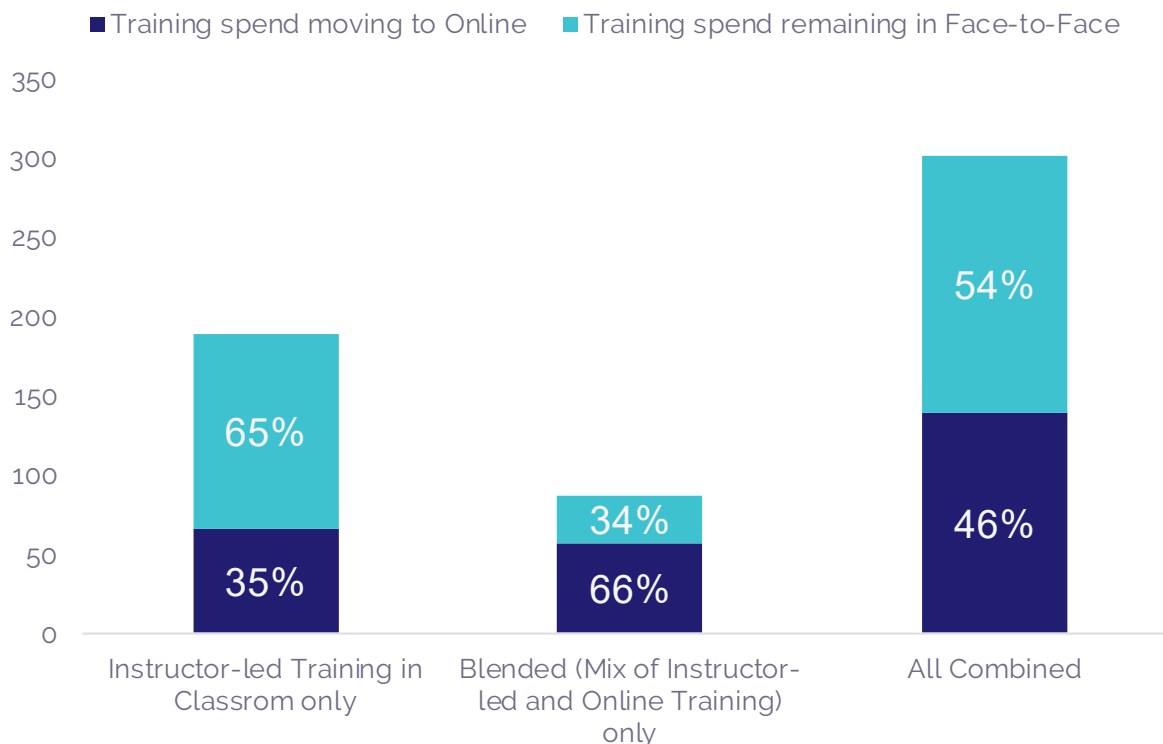
To further support this notion, a significant number of those with a preference for face-to-face classroom training (35%) believed their training spend is moving more towards online training in the future, instead of face-to face training.

The trend towards more investment in online training was even more prominent amongst those who stated the most effective delivery modality was blended, with 2/3 of this audience saying that training spend would be moving online over the coming 12 months.

This presents an opportunity for training organisations to recognise that there may be growing interest in blended training formats.

POST COVID-19

An additional survey undertaken by DDLS in June 2020 indicates that social-distancing measures as a result of Coronavirus have intensified demand for online and blended training formats in the short-term.

In the June survey, students were asked to identify their preferred learning environment. Preference for face-to-face classroom training (56%) was virtually on par with preference for blended training (mix of self-paced online learning plus live learning w/ instructor) (54%).

When compared to the earlier customer survey in which only 28% of respondents preferred Blended training formats, the June figures indicate a growing interest in and preference for Blended format training following COVID-19 social distancing measures.

ANSWER CHOICES	RESPONSES	
In person, in a classroom	55.65%	384
Dialling in via video to live instructor-led experience	24.64%	170
Online, seld-paced learning	28.99%	200
A mix - self-paced learning + live learning with an instructor	54.20%	374
TOTAL RESPONDENTS: 690		

CLOUD ADOPTION

Respondents were asked to describe where their organisation currently sits on the journey to cloud adoption. 20% of respondents said they had already migrated their core business workloads to the cloud and were currently optimising their cloud service. The majority of organisations (62%) said they were in the process of migrating various workloads to the cloud, while a minority of 17% said they were not currently considering migrating their core business workloads to the cloud.

Current Stage of Cloud Journey
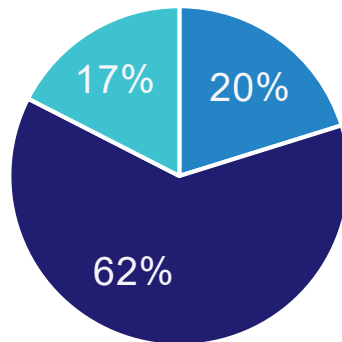
- Migrated core business workloads to the cloud, now optimising
- In the process of migrating various workloads to the cloud
- Not currently considering migrating core business workloads to the cloud

VENDOR CERTIFICATION

Respondents were asked to indicate the vendors/applications that their organisation uses. The three most commonly used vendors/applications were Microsoft Office 365, Microsoft Azure and Microsoft Windows.

86% of respondents used 4 or more vendors/applications within their organisation, which can be understood in the context of digital transformation. As organisations' requirements grow more complex, they increasingly require not one vendor or application but many to fully digitalise some processes.

In the instance of cloud computing - there is a growing trend of 'mutli-cloud' adoption in organisations, where they opt for not just one cloud provider, but several. This is due to the fact that different cloud services provide different applications, some of which are highly specific such as artificial intelligence and machine learning.

Vendors & Applications in use in the organisation

Amount of V&A's in the organisation
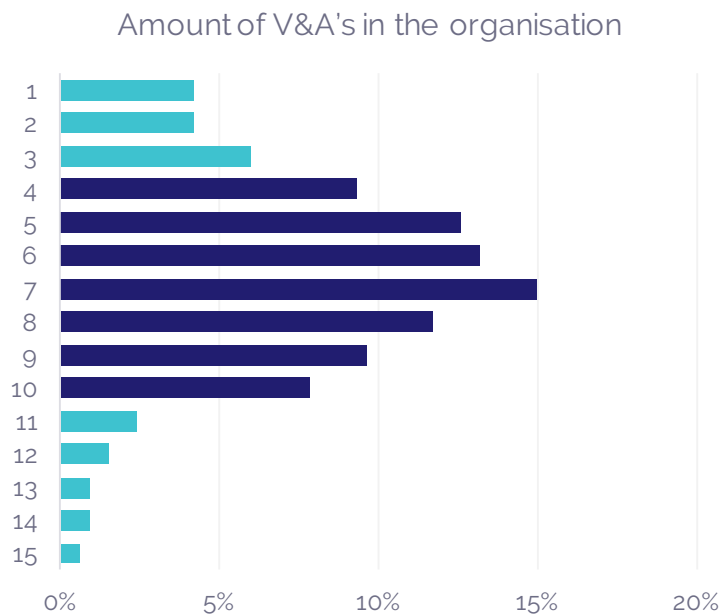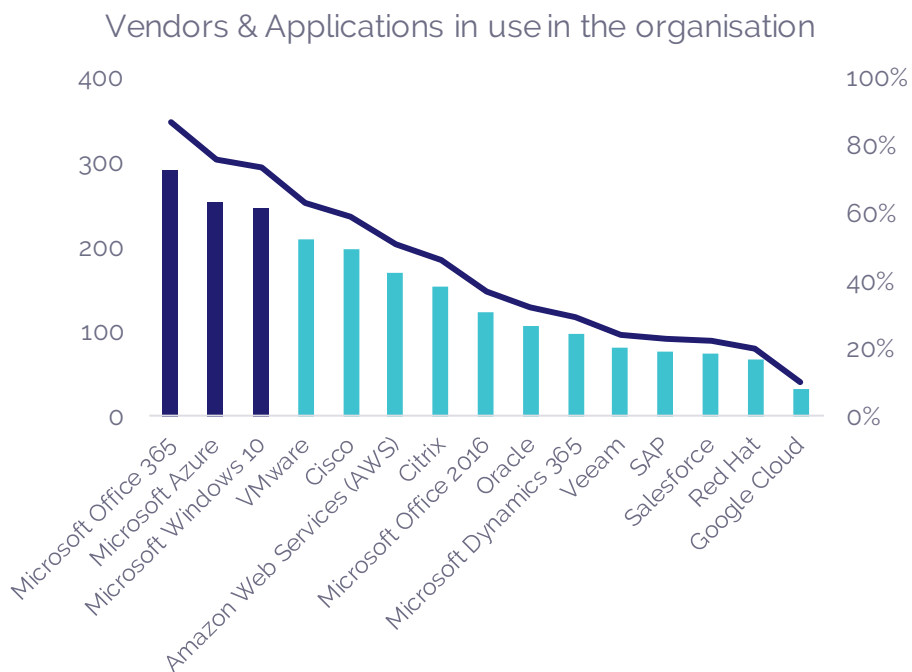
When asked specifically about the importance of vendor certification to their business (e.g. Microsoft, AWS), over half of respondents (51%) said it was 'Extremely important' or 'Very important'. 37% said it was 'Somewhat important', while 11% said it was 'Not so important' and 1% said it was 'Not important at all'.

This data could indicate that some organisations prefer employees with globally recognised certifications from particular vendors e.g. Microsoft and AWS, rather than employees with nationally recognised, generic VET certifications available in the market, such as a Diploma in IT. In this instance, whilst a Diploma in IT course would indicate the candidate has valuable skills, some employers may favour a candidate with vendor-specific certifications that are recognised on a global scale.

Importance of Vendor Certification

- Extremely important
- Somewhat important
- Not at all important
- Very important
- Not so important
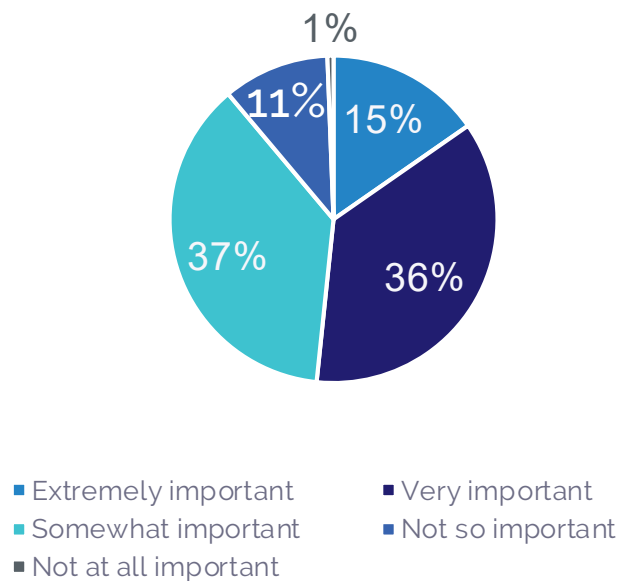
PROJECT MANAGEMENT

When asked if their organisation had a preferred project management methodology, 55% of respondents said yes, while 45% said no. Of those who responded yes, their most important project management methodologies used were Agile (35%) and PRINCE2 (24%).

Is any preferred Project Management
methodology in the organisation?

No
45%

Yes
55%

Preferred Project Management Methodology

Agile — 35%
PRINCE2® — 24%
SCRUM — 6%
Waterfall — 2%
All of them — 30%
Other — 3%
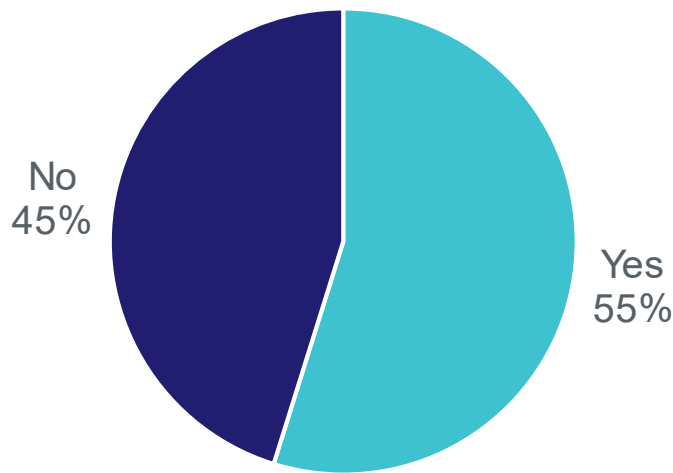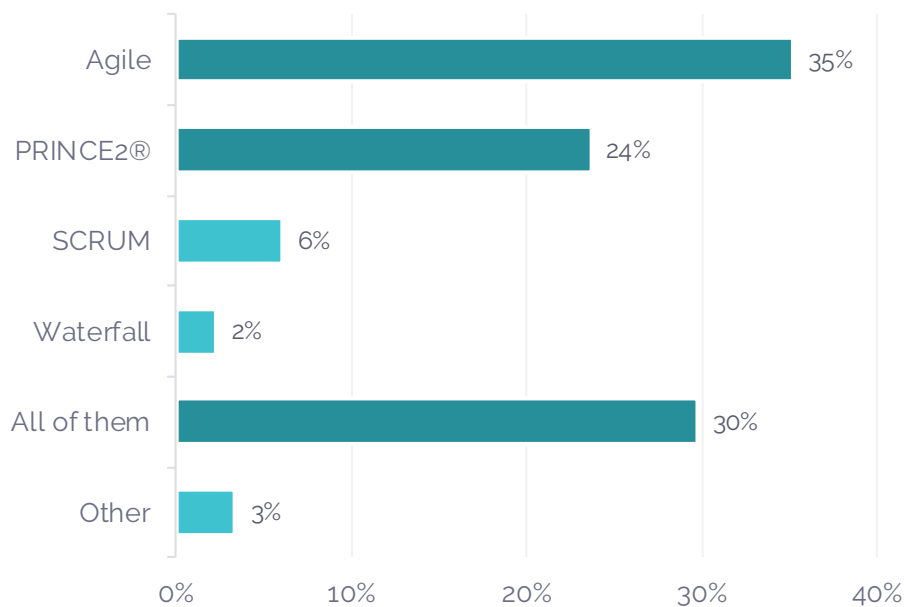
SELECTION OF TRAINING PROVIDERS

The following questions were asked in relation to DDLS' performance specifically, however the findings are indicative of what students expect from training providers in general.

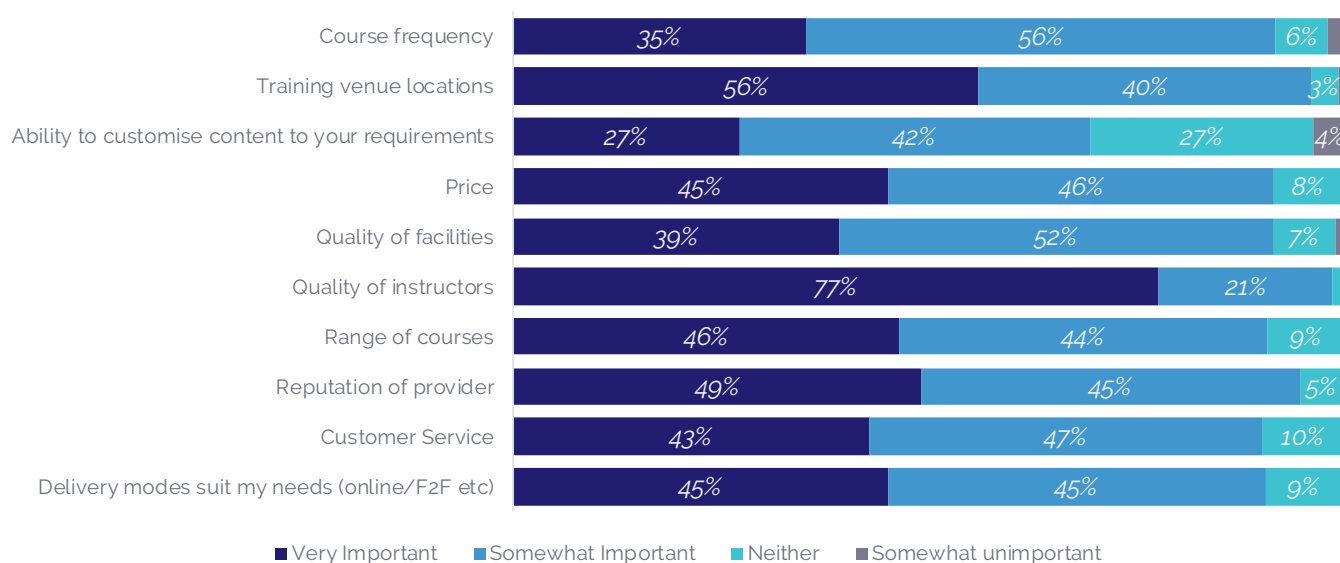When asked to identify the most important criteria when selecting a training provider, 77% of respondents reported that the quality of instructors was 'Very Important'. Similarly, 56% chose 'Venue locations', 49% chose 'Reputation of provider', 46% chose 'Range of courses' and 45% chose both 'Price' and 'Delivery modes' as very important criteria.

| Criteria	Very Important	Somewhat Important	Neither	Somewhat unimportant
Course frequency	35%	56%	6%	
Training venue locations	56%	40%	3%	
Ability to customise content to your requirements	27%	42%	27%	4%
Price	45%	46%	8%	
Quality of facilities	39%	52%	7%	
Quality of instructors	77%	21%		
Range of courses	46%	44%	9%	
Reputation of provider	49%	45%	5%	
Customer Service	43%	47%	10%	
Delivery modes suit my needs (online/F2F etc)	45%	45%	9%	

When asked to indicate the frequency of their training programs with DDLS, 44% of respondents indicated their employees had attended 1-2 courses, 30% indicated 3-5 courses, 15% indicated 6-10 courses, and 11% said they attended 11 or more courses.

With the majority of respondents (56%) indicating that their employees attended at least 3 or more courses, it is clear that many organisations are willing to invest in ongoing training for their employees, rather than looking for a one-off training course.

To further support this notion, the majority of respondents (76%) indicated they were likely or very likely to send their employees to another DDLS course in the next 12 months.

While this data is specific to DDLS, it indicates that all training partners should be investing time into creating training plans for their customers, as many are likely to be regular customers.

DDLS courses attended by their employees in the last 12 months

Likelihood of sending employees to a DDLS course in the next 12 months
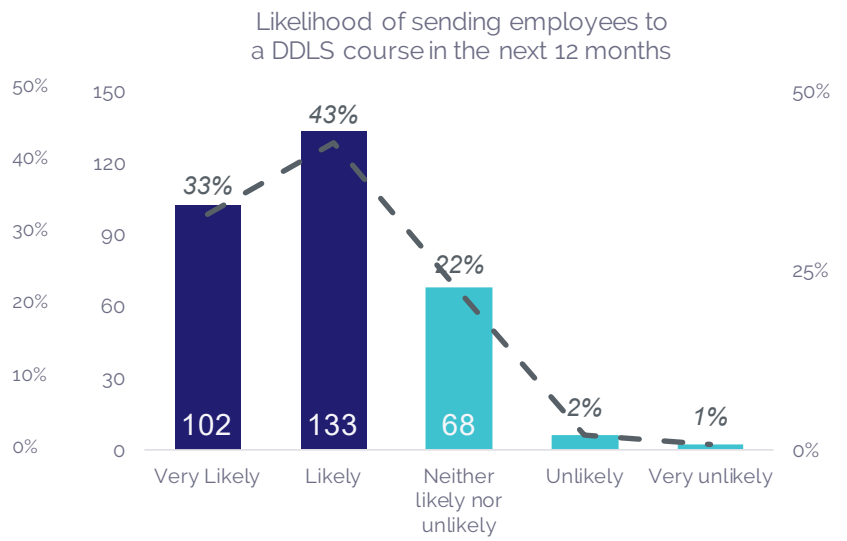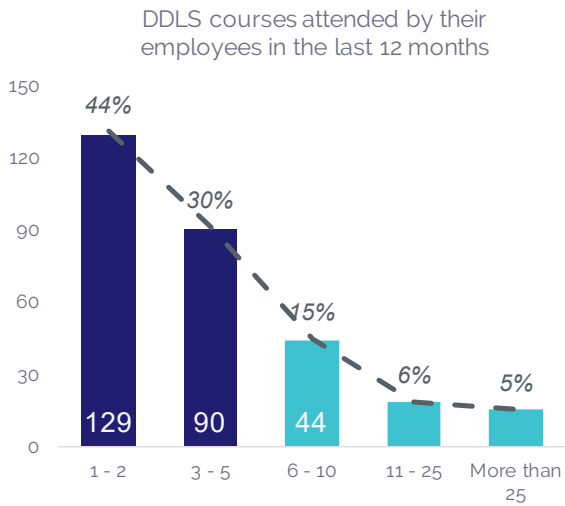
Hours of planned learning/professional development in the next 12 months?

ANSWER CHOICES	RESPONSES	
1-5 days (8 hours - 40 hours)	49.86%	346
5-10 days (40 hours - 80 hours)	30.84%	214
10+ days (80+ hours)	19.31%	134
TOTAL		694

DISCUSSION

DISCUSSION

- There is a gap between organisations' expenditure on ICT Projects, and their expenditure on training employees in ICT processes, exacerbating the existing critical skills shortage in some areas such as cloud computing and cybersecurity.

- The top two barriers to sending staff on training are budget constraints and giving staff time out of the office.

- The top four reasons to send staff on training are career progression, increased productivity, increased ability to incorporate new technologies into the business and increased job satisfaction and morale.

- The majority of respondents have already migrated to cloud or are in the process of doing so, which will result in an increasing importance on cloud training for organisations in the future.

- The top three training investment priority areas were IT Infrastructure and Networks, Cloud Computing and Virtualisation, and IT Service Management and DevOps.

- Having general cybersecurity awareness training for all employees is considered very important for the majority of respondents. Additionally, the majority of respondents specifically seek employees who have achieved certification in cybersecurity courses.

- However, cybersecurity did not make the top three areas of training investment, indicating that while some form of cybersecurity awareness training is important for nearly all respondents, not as many are prepared to invest in specialised cybersecurity certification, which can be costly and time consuming.

- The majority of respondents used 4 or more vendors/applications within their organisation and believe that vendor certification is important to their organisations. The average number of vendors/applications used in organisations and the perceived importance of vendor certification will likely increase as IT processes grow increasingly complex in line with digital transformation.

- The most important factors respondents considered when selecting a training provider are quality of instructors, venue locations and reputation of provider.

- The majority of organisations are willing to invest in ongoing training for their employees, rather than booking a one-off training course.

- While respondents reported the most effective training method to be instructor-led training in the classroom, there is a growing interest and budget dedicated towards Blended training (Mix of Instructor-led and Online training). Social distancing measures as a result of COVID-19 have further boosted interest in blended training formats.

- Considering one of the main barriers to accessing training is giving staff the time out of office, there is an opportunity for training organisations to provide more blended or fully online training in the future to satisfy students' changing needs and requirements.

LEARNING
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FOR PEOPLE
& BUSINESS.

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FOR YOU.

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Our consultants are standing by to help you choose from one of over 700+ instructor-led courses or to help create a more customised training solution to suit your needs.

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