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'TRAINING TODAY, TRAINING TOMORROW'

An Analysis of Learning Trends
Across Europe and Global
Comparisons

Jeremy Blain, Director, International Partners
Network, Cegos Group



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EXECUTIVE SUMMARY

This white paper, released in May 2011 at the American Society for Training & Development's Annual Conference, highlights some of the major trends facing the European L&D sector and assesses the responses from a pan-European survey of over 2,500 employees launched also in May 2011. The paper examines some of the survey's key results and also provides comparisons with other regions.

Key findings from the survey (which will be explored in further detail in the white paper) include the following:

1. Training is still delivering!

Despite all the potential difficulties training is facing, particularly with budget cuts and, despite the increased demands of the learner, it is clear that training is still delivering to employees today with a very positive approach towards training (section 8.1). Access to training, the effectiveness of training, manager involvement, the contribution of training to one's career, and the interest of the company in training were all cited as positive developments in the survey.

2. Emerging learning tools are growing in popularity....

The survey finds that new technology-facilitated learning tools are rising in popularity across Europe. Serious games and mobile learning, for example, have seen considerable growth (section 7.1) as have online learning and blended learning (section 6.3)

Reasons for this include the changing demographics in the workforce with the entrance of new generations (section 1.3) and their new demands, the reduced costs which allow employees to remain productive and incorporate training alongside their day-to-day activities, and the fact that suppliers in these areas are providing a highly engaged and immersive yet targeted learning experience.

3. Collaborative and informal tools are mirroring the new social, global and mobile environment

There is also an increased focus on collaborative and informal learning tools which are mirroring the changing structures within organisations, such as the globally dispersed teams, the changing employee profiles, and mobile workforces. Today half of those trained in Europe have used informal learning tools such as videoconferencing, wikis, blogs, forums and podcasts (section 7.3).

4. ...But not at the expense of traditional tools

Despite many predictions, however, these areas of growth are not taking place at the expense of more traditional, face-to-face classroom learning. Classroom and instructor-led learning remains as popular as ever among European organisations (section 6.1) and other face-to-face learning activities, such as coaching and mentoring, have also seen significant growth (section 6.2) which is helping to encourage individual accountability and nurture skills further down the organisation.

Against this context, the recent technology-enabled new learning offerings simply complete the suite of learning solutions on offer today. This variety of choice is both a benefit and a genuine need for learners today, especially considering the preferences among generations.

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TRAINING TODAY, TRAINING TOMORROW – KEY RESEARCH FINDINGS

Training is still delivering!

Emerging learning and collaborative tools are increasing in popularity but not at the expense of traditional, face-to-face learning tools. There is a need for a perfect mix in the provision of learning today.

Training today is demand rather than supply-driven.

There are changing internal organisational dynamics at work in the support of learning with an increased role for the manager in information about training but not the training itself.

There is increased concern over the influence of HR & L&D departments.

Management and leadership training are not receiving sufficient priority.

There is a growing gap in the attitudes towards training between the trained and the untrained.

5. The perfect but changing mix

European learners today are looking for a 'perfect mix' or 'portfolio' of learning tools. The human touch continues to be more popular than ever among the 2011 learning population but this must be facilitated by the enormous developments in technology in learning over the last few years. What is also clear is that any organisation that follows the latest technology fad at the expense of more traditional and proven techniques does so at their own peril and has a real risk of alienating the learner. Furthermore, this changing mix also enables more individualised offerings to be tailored to specific learner needs.

6. Today training is demand-driven

This evolution and subtle changes in training provision is an example of the fact that training today is demand rather than supply driven. The new generation of learners continue to demand more face-to face development as well as technology-facilitated channels; the use of e-learning tends to decline with age; and blended learning is equally well-received among learners of all ages.

Such is the engagement of learners in training that 79% are willing to give up their free time to undertake training and 61% are even prepared to part fund it (section 9).

A number of reasons for this move towards demand-driven learning can be found throughout this paper from the increasingly strident learning demands from the new generation entering the workforce through to the declining influence of HR and L&D departments.

The latter point raises the question whether professionals today are letting learners down. Are they able to adapt to learners' ever changing needs? The answer should be yes. If this isn't the case, there is a pressing need for learning professionals to be more proactive or face a continued decline in influence.

The opportunity is there and it is up to L&D professionals to take it. What is clear is that trying a 'one size fits all', lazy approach to L&D today is likely to lead to considerable disengagement.

7. There are changing organisational dynamics as to who is driving and supporting learning

One of the key findings from the survey was the shifting of control and influence on learning within organisations with an increased role for the manager.

Our survey found that HR and Training functions are well down the list of people who employees go to when requesting information about training (section 5.1) whereas 55% of employees go to their managers. Focusing on the role of the manager in greater detail, our survey also found that 76% of employees have managers who are very or quite involved in their choices of training as well as 69% in helping them implement what they have learned (section 5.1).

And in general, employees are very satisfied with the benefits they receive from managers being involved in post-training implementation with UK employees most satisfied with their managers (section 5.2).

However, while employees turn to their managers for information about training, they turn to expert coaches and tutors for the training itself (section 5.3) with only 14% of employees turning to their manager versus 48% asking for help from a coach.

8. Continued concern about the role (or lack of a role) of HR and L&D departments?

A persistent finding throughout this white paper is a lack of influence of HR & Learning & Development departments in areas where you would have thought they would have been employees' natural allies.

While there are many positive examples of L&D leading the way in companies, such as Hyatt, Petrobras, Vale, Disney, McDonalds, and John Lewis, the fact remains that our survey finds that HR Directors and Training Managers are a less popular source of information than colleagues, corporate intranets and certainly managers when it comes to securing information on training (section 5.1).

There's also the question that needs to be answered as to why nearly a quarter of untrained employees do not know why they have not had any training in the last 3 years and 89% have not even asked anybody for it. At best, there is clearly a communication problem and at worst an apathy on the part of employees towards L&D and HR departments.

Finally, there is potentially a growing gap between what learners want and what HR & LD specialists want to provide them (section 9).

9. Both Management and Leadership training, however, are not receiving sufficient priority within European organisations

Despite the increased role of the manager, there still seems to be a lack of priority given to management training – a decline in management and leadership training from 16% in our May 2010 survey to 13% in this survey (section 4.1). This decline in management training also mirrors a survey of 1,500 managers Cegos Group conducted at the end of 2010 and which found that one in four managers has had no management training. At a time when management skills are more important than ever – especially as companies look to rebuild after the recession – this is a cause for concern.

Our survey offers potential proof of this lack of focus on manager's needs with learners asking for support from coaches and mentors in their on the job training, rather than managers (section 5.3). This should act as a wake-up call for managers as well as HR with a potential future leadership vacuum upon us.

10. Finally, there is a growing gap in attitudes towards training between the trained and the untrained

There remains a growing gap between the trained and untrained with unsurprisingly contrasting attitudes towards training (section 9). Whereas the trained remain highly motivated in shaping their training paths (and even offering to finance it), the untrained are less willing to consider training outside working hours, for example.

What does this tell us? It tells us the power of training and how, once people have experienced it, that there is a clear engagement. It also tells us of the danger of an increasing gap within organisation between the 'haves' and the 'have nots' in regard to training.

1. INTRODUCTION & MARKET OVERVIEW

The global L&D sector today continues to face challenging times.

As organisations emerge from what is general considered the worst financial crisis and economic slowdown since the 1930's and as the path towards recovery continues, organisations are putting L&D and the skills of their employees under the microscope like never before.

Questions being addressed include: What can L&D achieve for my organisation? How should it be delivered? Who should drive it? And who should it be targeted at?

Furthermore, there is also the question of whether the recent recession has changed L&D irreversibly and how is the discipline likely to evolve over the next few years. Are the changing profiles of the workforce likely to have a major impact on training and how it is delivered, for example?

Before going into detail on the results of the pan-European survey – the cornerstone of this white paper – it is important to understand a little as to the context in which L&D operates today and some of the key drivers which provide a backdrop to the conducting of the survey. These include:

1.1 Tight Budgets & the Need for Increased Returns from L&D

There is no doubt that the recent recession has had a significant effect on L&D and training budgets the world over, although certain regions have been affected more than others – both in the level of cuts and in the speed of the subsequent recovery.

In the UK, for example, the 2010 Learning and Development Survey from the Chartered Institute of Personnel and Development (CIPD) revealed that training budgets were cut in more than half of the 700 organisations questioned.

The follow-up 2011 survey, published in April 2011, showed few signs of recovery. Two fifths of private sector organisations reported that their situation had got worse over the previous 12 months, while only one in 10 anticipated an increased investment in training in the next 12 months.

Of this, UK public sector cuts are having a significant impact with public sector employers three times as likely as those in the private sector to report that the funding of learning and talent development will decrease in the next 12 months.

A similar negative viewpoint can also be seen in the Keynote Market Report 2011 estimating a fall in the value of UK private sector training market of around 2.5% in the year to April 2011.

However, European research undertaken by Cegos Group in March 2009, among L&D professionals from companies in the UK, France, Germany and Spain, revealed that training budgets in Europe appeared to be holding steady. In the survey, 81% of organisations expected to sustain or indeed increase their investments in training during 2009. While this showed considerable optimism, we believe that only now in 2011 is investment in L&D stabilising although it is yet to return to pre-2008 levels. The European trend is, on the whole, positive although it is more important than ever that these budgets be used to maximum effect.

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... estimating a fall in the value of UK private sector training market of around 2.5% in the year to April 2011.

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Keynote Market Report 2011

The US saw double digit cuts in L&D budgets in 2008 and 2009 according to Bersin & Associates and their annual 2009 and 2010 Corporate Learning Factbook reports, although the signs of recovery are being seen in the US earlier than the UK. The 2011 Bersin & Associates Corporate Learning Factbook found that in 2010 US companies increased their training budgets by 2% compared with 2009, resulting in an average spending of \$682 per learner. While this is well behind 2007 levels, it provides certain cause for optimism.

Some of Cegos' European data has also seen a marked resilience towards the recession in L&D budgets. Cegos Group's own March 2009 survey, for example, taken when much of the world was in the midst of recession, found a surprisingly upbeat response with 81% of organisations expecting to sustain or even increase their investments in training during 2009. We are tracking these figures to see if this has been the case.

Other parts of the world have also been less affected. Investment in training in Brazil, for example, has grown consistently over the past five years with ABTD (the Brazilian Association for Training and Development) estimating that an average of \$810 is spent on employee per year. Furthermore, with developed countries likely to grow at a lesser pace than emerging economies (see World Economic Outlook) over the next few years, there may be many other Brazilian examples over the next few years.

Shifting Balances of Power?

The International Monetary Fund's 2010 World Economic Outlook highlights a potential shifting of power.



While advanced economies, such as the United States (projected 2011 growth of 2.9%); Japan (1.8%), the UK (2.1%) and Germany (1.6%) are seeing limited project growth in 2011, the same is not the case for emerging economies. China is predicted to grow at 9.6%, India 8.4%, Russia at 4.1%, Mexico at 4.4% and Brazil at 4.2%. How long before this growth is reflected in L&D budgets?

So what have these cuts and focus on cost and value from L&D led to?

In short, they have probably been the single most important factors in the evolution of L&D today from the duration and delivery methods of L&D, the use of technology and collaborative tools through to the support it receives from key members within an organisation. This focus on cost and value will be prevalent in the survey results we present in this paper.

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Cegos Group's own March 2009 survey ... found a surprisingly upbeat response with 81% of organisations expecting to sustain or even increase their investments in training during 2009.

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1.2 The Focus on Innovation

This focus on ROI and cost control has also shifted the focus in L&D beyond just efficiency towards a greater focus on innovation, lower cost development practices and technology-facilitated delivery channels.

Research shows, for example, that many companies are picking up their technology infrastructure projects that were shelved when budgets became tight. In the US, for example, out of the 2% increase in L&D investment that Bersin & Associates cited in their 2011 Corporate Learning Factbook, there has been a 10% increase in expenditure on learning technologies by US companies – nearly equalling the 11% high from 2007.

What are these investments on? According to Bersin, in some cases these purchases were companies replacing their old learning management systems with new solutions and, in other cases, the increased investment was the result of companies adding more functionality to their existing learning capabilities, such as informal learning.

A June 2010 study, for example, conducted by the US-based Elearning! Media Group found that 64% of all corporate respondents have implemented virtual learning within their organisations, and 18% more plan to add them.

Another report targeted at the UK – ‘The Towards Maturity Benchmark’ report from November 2010, which seeks to improve the impact on learning technologies at work and which interviewed 400 UK organisations – found that these organisations have more opportunity than ever before to embed learning technologies effectively.

The report views learning innovation as a key means of cutting costs and improving efficiency and access, finding that one in four of the 400 UK companies interviewed are allocating 30% or more of their available training budget to learning technologies compared to one in 10 in 2008.

Lower-cost development practices are being explored as well. Despite some of the negative results from the 2011 CIPD survey, the survey also found that UK companies have increased their training offering per employee this year compared with 2010 levels with an increase in the use of lower-cost development practices such as e-learning (practiced by 54% of organisations), coaching by line managers (47%), in-house development programmes (45%) and internal knowledge-sharing events (37%).

This growth in technologies and lower cost development practices is also being seen in Europe with a number of our Cegos Group surveys, prior to our 2011 one, pointing to this. For example, our May 2010 survey across the UK, France, Germany and Spain found Spain and the UK leading the way in their use of e-learning (with 56% and 53% of learners using it). In this survey, Spain leads in the video category with 57% of users utilising this functionality and Germany on its use of serious games and mobile learning with 21% and 15% of German learners using this delivery method. The survey also found that collaborative tools, such as blogs, forums and wikis, are also on the rise.

What is clear is that organisations are more innovative in their approach to L&D in these tough times with areas, such as blended learning and technology-led learning, being the main beneficiaries of training spend.

Yet, is this growth at the expense of traditional training techniques, such as face-to-face training in the classroom? The survey results show that this is not the case.

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... there has been a 10% increase in expenditure on learning technologies by US companies ...

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Bersin & Associates

1.3 The Changing Workforce

The makeup of today's global workforce is also undergoing a significant shift. In less than four years time, nearly half of the workforce will be made up of Millennials or Generation Y – those who were born between 1980 and 2000 (although definitions vary).

Millennials comes with certain characteristics, although this can vary by region. They are positive and confident, are used to working in teams, and are often multi-taskers. They also want to see where their career is going and are always looking for their next challenge. They are also highly technology literate and many are consummate networkers.

For organisations, these changing demographics pose a number of challenges. As well as meeting the needs of this new generation, they also have to meet the needs of four different generations of employees working side by side in today's organisation – all with different attitudes, preferences and expectations.

In addition to millennials, these groups include the traditionalists (born between 1925 and 1945) who are coming towards the end of their careers and value discipline and stability; the Baby Boomers (1946 to 1963) who are idealistic and competitive but dislike change; Generation X (1964 to 1980), who want greater flexibility in their working practices with a need for career portability and work-life balance; and then the Millennials.

Traditionalists 1925-1945	Baby Boomers 1946-1963	Generation X 1964-1980	Generation Y/ Millennials 1980-2000s
Value logic and discipline, stability, want a legacy.	Idealistic, competitive, questions authority, dislikes change, recognition, stellar career.	Work/life balance, career portability, flexible, some anxiety, dislike micromanagement.	Value diversity, technologically superior, change, want meaningful work.

50% of workforce in < 4 years

Organisations need to listen to all these individuals' needs and also ensure that the training practices deployed reflect the changing workplace. They also need to work out how to transfer knowledge and skills from the Baby Boomers and Generation X to the new millennials and to help older employees understand these new generations.

Some of these issues were explored further in a Cegos Group survey in December 2010 of 1,500 senior managers across the UK, France, Spain and Germany. The survey found that managing older and younger generations is high on the agenda for today's manager, viewed as a bigger challenge than other key drivers, such as remote management and the increase in internet usage. Here, countries varied as to whether managing older or younger generations constituted the most significant challenge.

In the UK, for example, 38% considered the arrival of younger generations into the company being the most significant short-term and medium-term challenge, whereas a higher figure (45%) considered the management of older workers a bigger challenge. Spanish managers also considered managing older workers more of a challenge than younger ones, whereas France and Germany thought that managing younger generations would be more difficult.

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If there is one thing Millennials and their bosses can agree upon, it's this: They're special. That's what everybody has told them all their lives.

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Barbara Keats, Management Professor, W.P Carey School of Business

These demographics will have a powerful impact on the different forms of L&D available today, as our survey results will illustrate. It is essential to understand the demographics of today's workforce and the needs of the younger workers entering it. If we understand this, we will understand the future and how organisations need to change today.

1.4 The Growing Power of the Learner

Linked to this change in demographics is the issue that we have covered in a number of our previous white papers – the growing power of the learner.

In the current economic climate, employees are highly motivated to develop their skills and take control of their learning. Our May 2010 survey reinforced this theme finding that as many as 76% of respondents were willing to give up their free time to undertake training and 53% were even prepared to part-fund it. A further 61% of training across four European countries was undertaken mainly as a result of the employee's own initiative.

This growing influence of the learner and the evolution of training from being supplier to demand-driven will be a constant theme in this white paper as well as how organisations are reacting to this internally. What this shows us is how much support there is for training and how important it is that we, as L&D professionals, don't let employees down in providing it. Our survey results will attempt to tackle this issue in greater detail.

1.5 The Growing Influence of Globalisation and Mobilisation

Finally, another important driver to keep in mind when reviewing the survey results in this paper are the twin issues of increased globalisation and mobilisation.

Globalisation describes the process by which economies, societies, and cultures have become integrated together into a global network through communication, transportation, and trade. This has resulted in organisations with employees of many cultures and nationalities and where it is increasingly common for teams to comprise employees from multiple countries and across multiple time zones.

What does this mean for L&D? It means that there needs to be a greater focus on how effective L&D is within this new environment and how L&D must reflect the new globalised and mobilised workforce environment. Bersin & Associates' 2010 survey, for example, found that greater effectiveness in training was the top priority among L&D professionals.

Mobile learning, for example – which would appear to be ideal for the new disparate team structures – has typically been focused around the delivery of bite-sized learning often as part of a blended approach which reinforces classroom-led training. It is also beginning to become a tool, however, for more informal learning, such as accessing training on a mobile device 'just in time' to solve a work problem.

Key opinion formers at the American Society for Training & Development, for example, have made several interesting predictions in regard to just in time learning comprising three-minute learning vignettes where you ask a question and get an answer. Such tools already exist with sites such as WikiAnswers but, as yet, they are rarely seen in the corporate environment.

Furthermore, with the rise of technology-led solutions and the dramatic rise of informal learning/social networking, Web 2.0 technologies and other interactive and collaborative tools increasingly contributing to the mix, our survey will examine whether L&D is keeping up with this vision and the changes in the marketplace.



KEY ISSUES TO KEEP IN MIND WHEN ANALYZING THIS SURVEY

Tight Budgets, a Focus
on Costs and the Need
for ROI

A Growing Focus on
Innovation and New
Technologies

Changing Workforce
Demographics – The 'I
Want it Now' Millennial
Generation

The Growing Power of the
Learner

The Influence of
Globalization and
Mobilization



2. THE CEGOS GROUP SURVEY – ‘TRAINING TODAY, TRAINING TOMORROW’

The survey, which will be the main focal point of this white paper, was carried out across five key European markets – France, Italy, the UK, Spain and Germany.

The survey took place in January and February 2011 and was conducted by the Cegos Observatory, which has been assessing and surveying trends in the L&D marketplace for the last 30 years. This current survey was the latest in an annual series of surveys which examines current learning trends in the European training market. With the previous survey taking place in May 2010, there will be a number of comparisons to that survey during the paper.

45 key questions were asked with the survey providing the highlights of the findings. The objectives of this survey were to better understand the training needs of European employees and to evaluate key changes taking place in the marketplace.

2,542 employees were surveyed with the respondents divided into two distinct groups – those who have and those who haven’t received training. Figure 1 provides more detail of the survey sample. Respondents were almost equally divided between executive and non-executive employees. In terms of age groups, as you can see, there was a strong cross section with 25-34 year olds and 35-44 year olds most strongly represented.

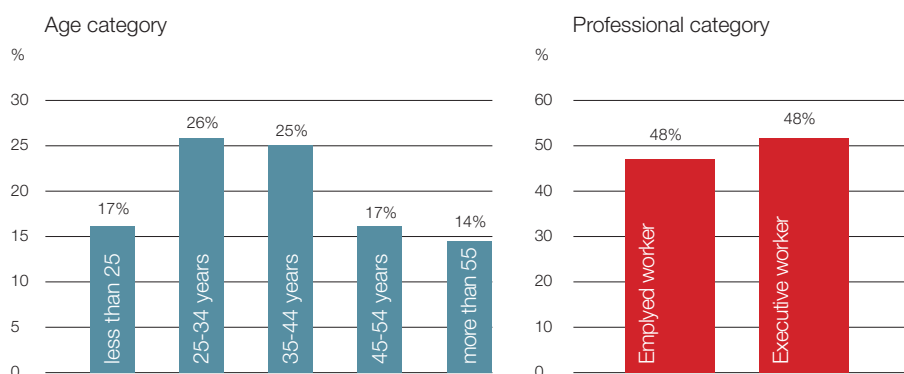


Figure 1: Survey sample demographics

The results of the survey will be separated into a number of subject areas: An examination of hours training received by country; the focus and preferred duration of training today; the main training leaders within an organisation; the delivery of training; a closer look at online distance learning; the effectiveness, evaluation and what are considered positive developments in training; the gap in attitudes between the training and the untrained; and finally, training priorities for 2011.

3. TODAY'S TRAINING PRACTICES – THE HOURS OF TRAINING RECEIVED

Respondents, who have received training, were first asked the question: how much training they have received at their organisation over the past year.

Figure 2 shows the results with considerable variations across countries. UK employees, for example, receive the least hours training per person (6 hours) compared to Spain and France where trained employees receive 13 hours and 10 hours per person respectively. Italy and Germany were only just above the UK with 9 hours and seven hours respectively.

What can we draw from these results? Is it a fair indication of the priority given to training in different European countries?

As is so often the case with L&D, things are rarely as clear-cut as simply the duration of training. A number of other factors should be taken into account as well, including legislation, budget allocation per employee, and the types of training methods being used. Longer periods of training don't necessarily mean more effective and better training.

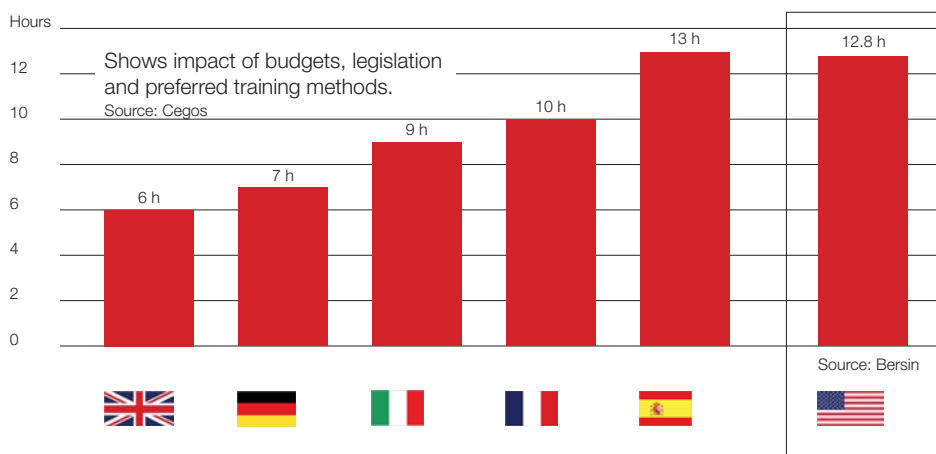


Figure 2: Amount of training the average trained employee received last year

3.1 The Impact of Legislation

Some countries face more legislative requirements than others in regard to training.

In the UK, for example, there is little statutory responsibility for employers to fund training, with some exceptions in medicine, education and legal services. As of April 2010, UK employees in businesses with over 250 employees have the right to request time off for training with a procedure for the individual to make the request and then for the employer to hold a meeting with the individual to discuss it. This is as far as it goes, though, with plans to extend this right to employees in organisations of all sizes currently on hold.

In other European countries, however, there is a much clearer defined statutory responsibility. For example, in France, 1% of any company's salary bill must be spent on training and development or it is levied as a tax on employers.

In Germany, the existence of 'workers councils' helps secure L&D budgets and both Spain and Italy have statutory measures in place where companies have to pay a specific contribution towards training. It is this legislation that might affect the higher amount of training in countries, such as Spain and France.

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... in France, 1% of any company's salary bill must be spent on training and development or it is levied as a tax on employers ...

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3.2 The Impact of Different Training Methods

Training methods are also a factor.

As our survey will later show, the UK and Spain use more e-learning and blended learning as part of the training mix – types of training which tend to be shorter and more focused as compared to France, for example, which continues to prefer longer more face-to-face training. This is reflected in the amount of average training per employee. We will discuss the delivery of training in much more detail further into this white paper.

3.3 Global Comparisons

So how does Europe compare to other regions in terms of the duration of training given to employees?

The final column shows the average duration in the US, according to Bersin – 12.8 hours per year per employee during 2010. The figure is a 13% increase over 2009 figures and confirms the return to training investment which is being seen in the US, with investment certainly increasing at a faster pace than in Europe.

The US is also a country with few statutory requirements forcing companies to adopt training and is also leading the way in the adoption of e-learning and other technology-based applications, demonstrating that legislation and longer classroom-based learning are not the sole drivers behind the higher figures.

“

... a 13% increase over 2009 figures and confirms the return to training investment which is being seen in the US, with investment certainly increasing at a faster pace than in Europe ...

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4. TODAY'S TRAINING PRACTICES – THE FOCUS OF TRAINING TODAY

The survey also asked the question where training is being focused today. Potential categories included job-related technical skills, management, HR, and commercial areas, such as sales and marketing.

4.1 Technical Training Leads the Way

Clearly, 'must have' job related technical skills training remains the most popular form of training with 26% (up from 23% in the 2010 survey) of training across Europe focusing on this area.

This is followed by professional efficiency, communication, languages (17% – up 3% from our 2010 survey) and management, finances, purchasing, logistics, and Quality Systems Engineering (QSE) (13% – down 3% on our 2010 survey).

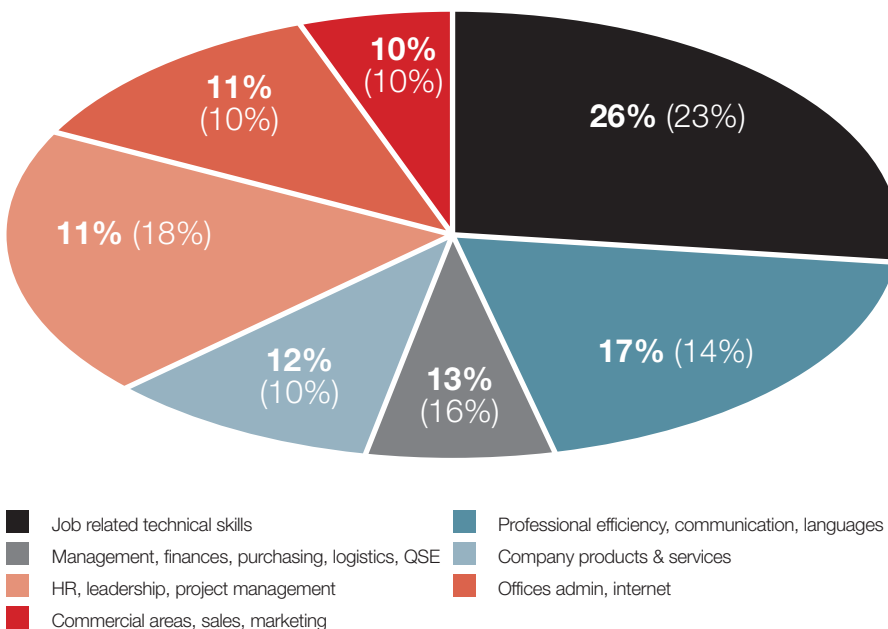


Figure 3: Domain focus for training courses in Europe.

Highlights the full European results with our May 2010 survey results in brackets.

What is also interesting is that HR, leadership and project management training has decreased to 11% of training this year from 18% in our May 2010 survey.

What can be surmised from this?

As we will also see when comparing with other regions, technical and often compliance-led training remains core to L&D today. The increased global nature of organisations is also perhaps one of the reasons why we have seen an increase in professional efficiency, communication and language training.

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a survey of 1,500 managers ... conducted at the end of 2010 and which found that one in four managers has had no management training.

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The decline in management and leadership training from 16% in our May 2010 survey to 13% today is also a cause for concern, particularly as management skills will be core to organisations hoping to put the slowdown behind them and embark on a period of sustained growth. This decline in management training also mirrors a survey of 1,500 managers Cegos Group conducted at the end of 2010 and which found that one in four managers has had no management training.

The drop in HR training could be a reflection of the declining position of HR and L&D departments within organisations. We will examine this hypothesis in greater detail further into this paper.

4.2 Country and Global Comparisons

Figure 4 looks at the results by country, where it is interesting to see that Germany has less of a focus on job related technical skills training compared to the other countries (only 18% versus 34% in France, for example), but the greatest focus on professional efficiency, communication, languages at 21%. Germany is also the only country with HR, leadership, project management training in the top three areas of focus (although the proportion has dropped compared to last year).

How do these L&D priorities compare with other regions outside Europe?

According to Bersin & Associates and their 2010 Corporate Factbook, the top priorities among US companies are meeting compliance requirements and improving skills that are highly specific to a learner's job – a finding which is similar to our European findings. The 2010 Bersin & Associates Report (see figure 5), found that profession and industry-specific training programmes received 18% of L&D spending in 2009 and mandatory and compliance training 16%.

The situation is similar in Asia where technical, product and compliance based learning are on the increase – so much so that financial compliance training is often driven by compliance/risk departments rather than training departments, for example

Top 3 training areas by country



Figure 4: Domain focus for training courses in Europe by country

A possible divergence between Europe and the rest of the world is being seen in leadership development.

While only 11% of training covered HR, leadership and project management training in Europe, 24% of training funds in the US according to Bersin was earmarked for this area in their 2010 Corporate Learning Factbook. In Latin America, and according to the ABTD in Brazil, as much as 52% of training investment is being directed to leadership training.

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In Latin America ... as much as 52% of training investment is being directed to leadership training.

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European organisations ignore management and leadership skills at their peril. Our Cegos survey, conducted at the end of 2010 of 1,500 senior managers across the UK, France, Spain and Germany, identified current management flaws and the importance of management skills being developed to counteract them.

The results found that only one in five managers (21%) spend more than half their time managing people with almost a third of managers (31%) spending less than 30% of their time managing people. The survey also found that, rather than putting in place long-term development strategies, 85% of managers said that managing short-term conflicts within the business is one of their most important roles. Management and leadership training needs to receive priority.

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... 85% of managers said that managing short-term conflicts within the business is one of their most important roles.

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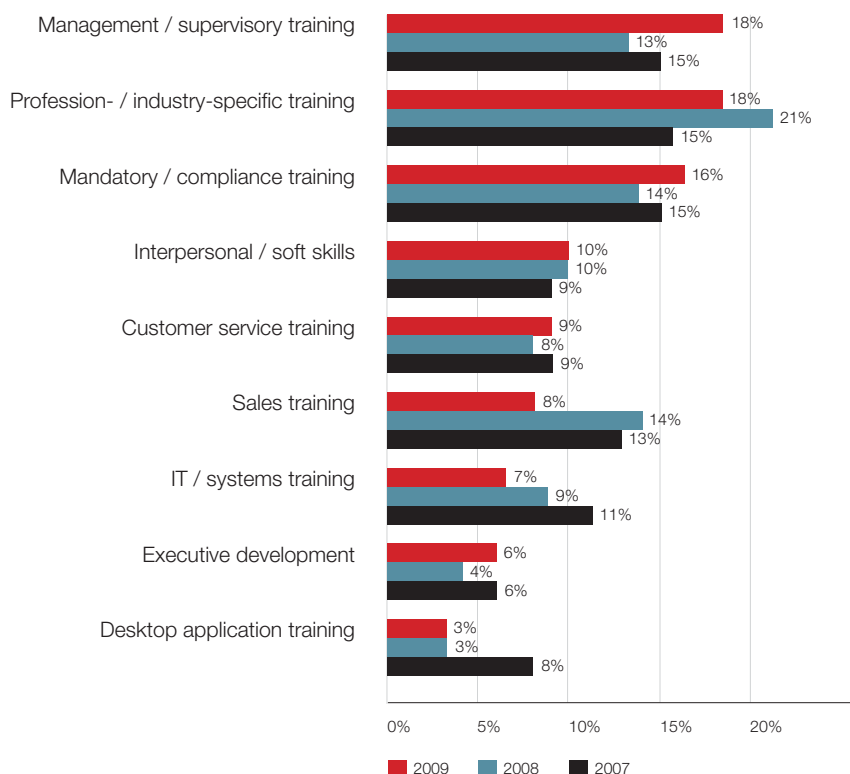


Figure 5 – Allocation of L&D spend, 2007-9, Bersin & Associates

4.3 Preferred Duration of Training

In terms of the preferred duration of training, as illustrated in figure 6, our survey found that employees prefer shorter face-to-face training courses with two days being away from the office considered the optimum length as opposed to the week-long training courses of the past.

Why is this? The answer is because employees simply don't have that luxury. The focus for employees today is on productivity and accountability and nobody can afford to be away from their desk for days at a time.

When asked how long they considered an e-learning module should take, the majority preference was for between 30 minutes and an hour. Virtual classrooms are also growing in popularity with most people preferring these to be around one hour in duration.



Figure 6: Preferred durations for the different training modes

5. THE MAIN TRAINING LEADERS WITHIN ORGANISATIONS

A key element of Cegos Group's 2011 survey was to find out who the main leaders are within organisations in driving European L&D today?

What part of the organisation helps shape the L&D agenda and to whom do people come when looking for training?

5.1 Who do Employees get their Information on Training from?

We asked our survey who they went to for information on professional training provision. As figure 7 illustrates, the majority of employees (55%) go to their managers for information about training. HR Directors and Training Managers are a less popular source of information than colleagues and corporate intranets – with only 36% of staff going to HR Directors and Training Managers – what one would consider the natural first port of call for training information.

What can we read into this? Are we seeing the growing irrelevance of HR and training managers or a growing interest of managers in training?

For some organisations that have well developed intranets, there is less of a need to go directly to the HR/training function for information on professional training. In this respect, as it would presumably have been the HR and training function who put such information on the intranet in the first place, this could be viewed as an affirmation of these departments actually doing their jobs.

It could also mean that employees are simply more comfortable in talking to their managers about training and is an endorsement of many HR and training departments' goal to provide more training responsibilities to line managers and empowering other individuals to take control of training. A less charitable interpretation, however, would be that HR and training departments are being viewed as less approachable these days and are all too often being bypassed with business functions taking up the reins.



Figure 7: The most popular sources of information that trained employees use to find out about professional training

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... the majority of employees (55%) go to their managers for information about training.

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From a country-by-country perspective, the UK has the highest level of employees actively seeking information from managers about professional training at 67% with Spain the lowest at 45% (see figure 8).

France is the only country with the HR/training function in the top three sources of information (possibly reflecting French legislation mandating a certain amount of training for each employee and therefore strengthening the role of the HR/training function who are often dispensing the training).

Spain has the lowest response rates of any of the countries surveyed with regards to seeking information from managers and colleagues, yet Spanish employees receive the most hours of training and are key users of e-learning and blended learning. Perhaps Spanish employees simply don't need to seek out information on learning as, more often than not, it is available to them anyway.

Top 3 sources of information about training by country






	67%	Manager
	53%	Colleagues
	48%	Corporate Intranet
	55%	Manager
	49%	Colleagues
	40%	HR Director / Training Manager
	56%	Manager
	48%	Colleagues
	46%	Corporate Intranet
	45%	Manager
	41%	Colleagues
	38%	Corporate Intranet
	54%	Manager
	45%	Colleagues
	41%	Corporate Intranet

Figure 8: The most popular sources of information that trained employees use to find out about professional training by country

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France is the only country with the HR/training function in the top three sources of information...

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5.2 Focusing in on the Role of the Manager – Support in Post Training Implementation

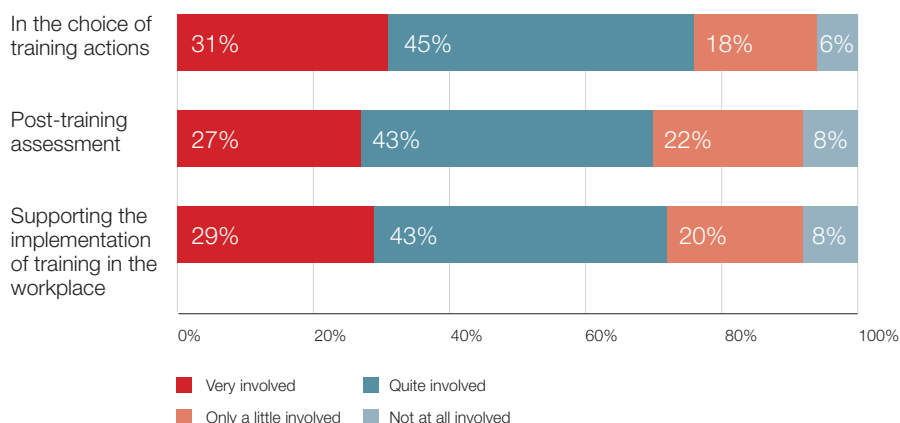
Employees were also asked to evaluate the role of their managers in their different stages of training (figure 9).

76% said that their manager was very involved or quite involved in their choice of training and 69% said their managers were involved in helping employees implement what they had learned from the training. When looking at the data by country, it was French employees who have the lowest marks for their managers' involvement.

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... it was French employees who have the lowest marks for their managers' involvement

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Country breakdown for “very involved” managers

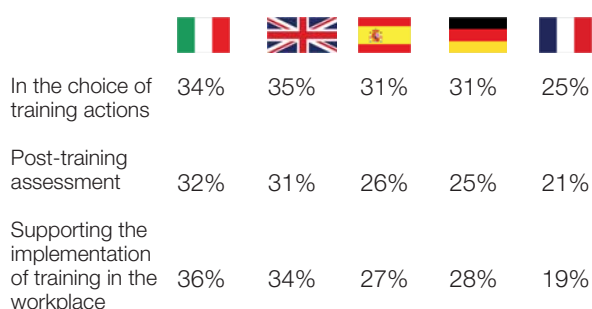


Figure 9: How managers are involved in the different stages of the training journey of their employees

Figure 10 sees employees being asked how much they feel they have benefitted from their manager's involvement in supporting what they have learned through training. The answers below are on a country-by-country basis and show that the UK is most supportive of the manager's role with nearly one in two saying that they have absolutely benefitted from their manager's involvement and 88% saying they have 'absolutely' or 'a bit' benefitted from management support in training implementation, followed by Italy with 78%.

At the other end of the spectrum is France, where 40% say they have either 'not really' benefitted or 'not at all'.

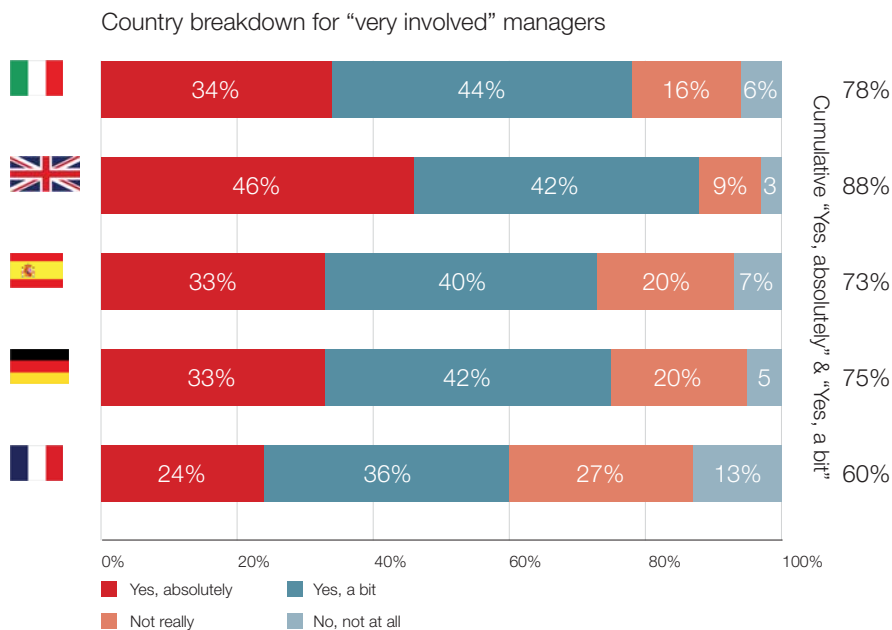


Figure 10: How much employees have benefitted from their manager's involvement in training by country

5.3 The Importance of Coaches in Supporting the Training

When looking at on the job training in particular, however, and who employees typically prefer to work with (see figure 11), the results show that managers are typically the last person employees turn to, with only 14% of employees turning to their manager versus 48% asking for help from a coach.

There are a number of observations we can make here. Firstly, from the perspective of technical/job related skills, it is often more appropriate for an expert to be brought into the mix than a manager, explaining partly why a manager comes so far down the list (this argument could be made of coaches as well, though).

However, one could equally argue that these figures also take into account training for personal development which the manager could and should be more involved in if he or she has had the necessary training.

There are a number of observations and questions we can raise here – namely is this a case of managers requiring more training and should there be a greater focus in this area? A lack of training could account for what is potentially a lack of confidence in the manager among training staff, for example. L&D professionals need to make sure that managers have the skills they need to coach and develop their staff. The figures from this survey, however, as illustrated in section 4.1, show that much more needs to be done in the training of managers.

It would appear that a potential contradiction exists here where employees turn to their manager for information about training (see figure 7) and also see managers heavily involved in the choice of training and the training follow-up (see figure 9), but it is the expert coaches and tutors that employees go to for the training itself. Again, there is no sign of any role for the HR and L&D departments.

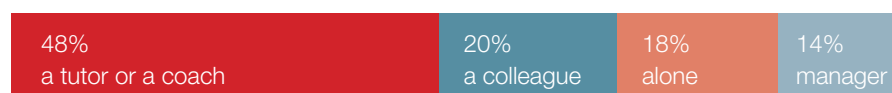


Figure 11: Who trained employees turn to for on the job training

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... only 14% of employees turn to their manager versus 48% who ask for help from a coach.

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6. LEARNING PROVISION & DELIVERY

So what are the main forms of training delivery today?

Does group training in the classroom still dominate or is it being usurped by other forms, such as online distance training or blended learning? Figure 12 provides an overview of the most popular forms of learning today (what are the different forms of training from which you have benefitted?) with comparisons to the results from the May 2010 survey in brackets. Figure 13 then breaks down these figures by country.

So what are the key highlights and how do they compare to other regions?

6.1 The Importance of Classroom Training

As one can see, the human touch still remains core to training today with, despite much talk of its demise, classroom training still the most widely used method across all companies and remaining at almost the same level as it was for the May 2010 survey. Examine the popularity of classroom training by country and it is only Spain that is less than 90% – down at 82%.

How does this compare to other countries?

Figures from Bersin Associates over the last few years show that classroom training – in their description instructor-led training (ILT) – has not been as impregnable in the US as in Europe. Although ILT remains the dominant delivery method, its use declined from 67% of training hours in 2008 to 60 percent in 2009. The 2011 Corporate Learning Factbook also noted that there has also been a transition towards virtual classrooms.

There is also a demand for more classroom learning as we found in 2009 research Cegos Group conducted where 42% of HR professionals and 38% of employees wanted to see more classroom learning (see figure 14). This comes with a caveat, however, with other employees also wanting to see more other types of learning as well.

6.2 The Rise of Coaching

Business coaching and mentoring has also seen a significant increase in uptake between our May 2010 and May 2011 research – from 35% to 43%.

There has also been a marked increase in its popularity by country, with coaching most popular in Germany where 57% of respondents said they had benefitted from coaching in their training activities. Whereas coaching was also popular in the UK and Italy, it was less popular in Spain and particularly France.

This increase in coaching mirrors other coaching market research that have all noted strong growth. The biggest of these was the Frank Bresser Consulting Survey 2008/2009 that examined coaching in 162 countries across the world. The research found strong growth on coaching although a bias towards developed countries.

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... Business coaching and mentoring has also seen a significant increase in uptake between our May 2010 and May 2011 research – from 35% to 43%.

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For example, more than two thirds of all coaches are based in the European Union, USA and Canada; and the seven countries with the highest numbers of coaches (US, UK, Germany, Australia, Japan, Canada, South Africa) comprise only 10% of the world population, but about 73% of all coaches. Coaching is now widely accepted and used as a business tool in 28 countries (of these 14 are European). However, in 114 countries (about 70% of all countries), it is not. Out of the 44,000 business coaches working worldwide, for example, there are only 2,000 working in Africa with South Africa accounting for 70% of this total.

Given that coaching is slanted towards the developed world, what factors can we point to in order to explain its rise in our May 2011 survey?

Possible elements might include the quite significant job leaps that many employees are taking which will require one-on-one support; and the host of new post-recession challenges that many senior managers are facing.

In times of economic uncertainties, as we have seen over the last two years, coaching is a highly effective tool to improve employee engagement and morale. With the top-down, 'we know best' model of management having failed on occasions in the past, there is a need to encourage individual accountability and nurture skills further down the organisation moving individuals from compliance to commitment– something that coaching is ideally placed to do.

One word of warning, however, is that the rise of coaching and coaches' roles throughout an organisation might see the reduction in the role of line managers in employee training. Section 5.3 has already identified that this is happening. This links back to a point that we made right at the beginning of the survey that we need to 'upskill' managers now to play a bigger role in training and meet what is clearly a genuine need. Perhaps too many managers see coaches as a means of pulling back on their training responsibilities?

6.3 New Technologies – Augmenting Classroom Training

Our survey shows that online learning and blended learning are on the up as well. Online learning is up from 42% to 44% and blended learning from 31% to 37%. In blended learning it is the UK and Italy leading the way with France playing catch up concerning online distance learning, Spain, the UK and Italy are the forerunners with Germany and France quite some distance behind. The fact that Spain and UK are ahead in e-learning mirrors previous Cegos Group research results in 2009 and 2010.

One possible reason for France and Germany lagging behind in this area could be legislation-driven training which encourages a 'sheep dip' approach with a lack of customisation and a lack of focus on changing learner needs. Here, face-to-face training tends to be the easy option. However, the fact that Spain, with similar legislation, is embracing new techniques could possibly act as a template for future trends in France and Germany.

What is clear from these figures is that while many people predicted that the growth in technology-led training would lead to the demise of classroom training, this is far from the case with technology not replacing the classroom but augmenting it. Creating a perfect mix of training is one of the fundamental messages to come out of this white paper, exemplified by the fact that blended learning remains popular and continues to grow.

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Online learning is up from 42% to 44% and blended learning from 31% to 37%.

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In terms of what forms of learning are being embraced by employees with different profiles, qualitative information from the survey indicates that the new generation of learners continue to demand more face-to-face development; that the use of e-learning tends to decline with age; and that blended learning is equally well-received among learners of all ages. A key attribute of blended learning comes into play here – namely its ability to be personalised for different learners.

What we can also note from these changes in delivery is that L&D is demand rather than supply driven today and needs to consider and respond to the individual needs and preferences of its target audiences. One size fits all is no longer the case and with the changing employee profiles is likely to lead to considerable disenchantment and disengagement.

How do these figures compare with other countries?

According to Bersin & Associates, approximately one third of US organisations used rapid e- learning tools to create learning programmes in 2009 with online self-study taking up to 20% of training hours. This is a trend which is also happening in other technology savvy markets, such as Chile, Canada and, to a growing extent, Brazil.

Outside Europe and the US, Asia is seeing an increase in blended and e-learning although bandwidth still remains the greatest barrier in Africa.

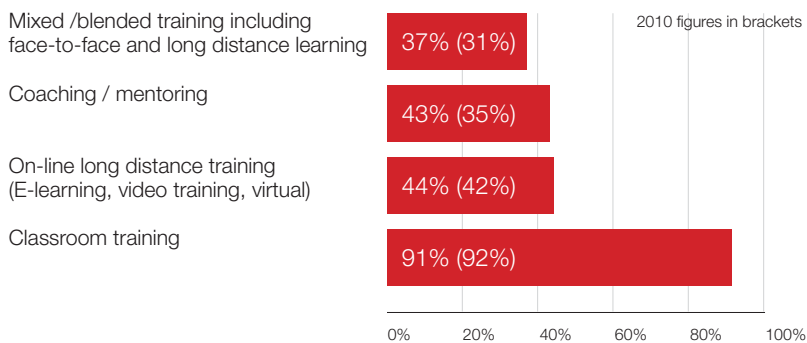


Figure 12: Modes of learning used by trained employees in Europe

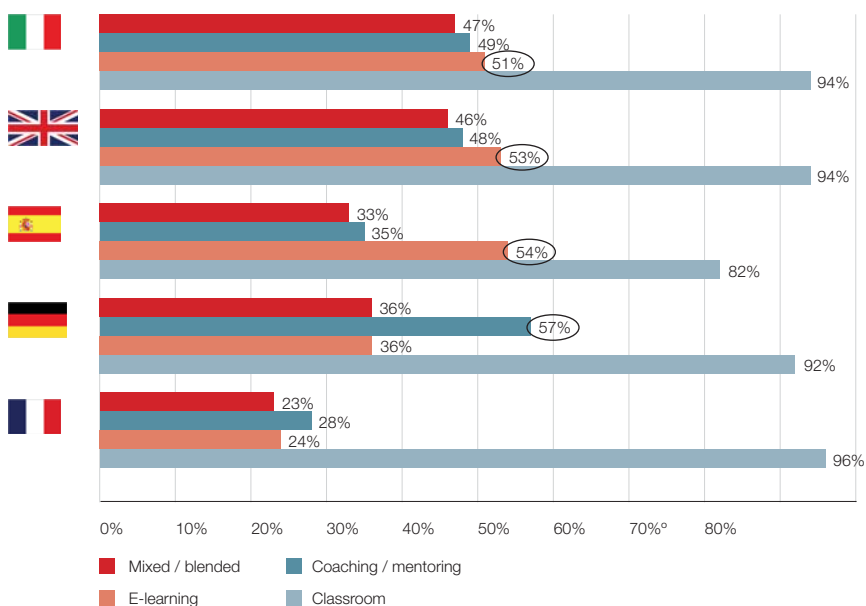


Figure 13: Modes of learning used by trained employees in Europe by country

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... the survey indicates that the new generation of learners continue to demand more face-to-face development ...

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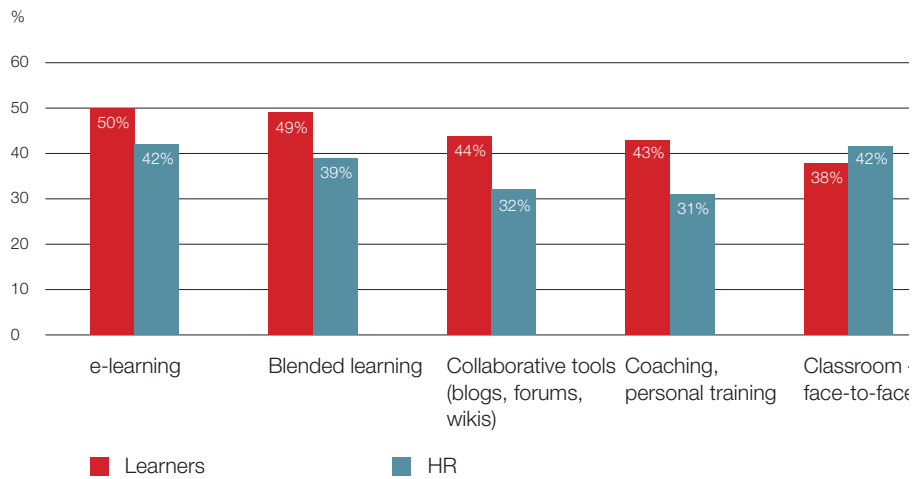


Figure 14: The divide between the tools employees wanted to use and what HR was planning to deploy (Cegos 2009)

7. A CLOSER LOOK AT ONLINE DISTANCE LEARNING

The survey also takes a look at the different forms of online, distance learning in more detail. Figure 15 asks what modes of online distance learning European employees are using.

7.1 Serious Games and Mobile Learning

As one can see, serious games and mobile learning have both seen a significant surge this year compared to 2010 (illustrated in figure 16). Serious gaming has increased from 15% in May 2010 to 24% in May 2011 and mobile learning from 9% to 21%. Forrester Research backs this up, expecting serious games to take off in the next five years due to 'technology populism' and the Generation Y effect.

What are the drivers for these different types of learning and how do our figures compare with other regions?

In both cases, the proliferation of hardware, such as smartphones and tablet computers (for example, the iPad) are facilitating the progress of both delivery channels as are a number of key global drivers.

These include the need to reduce costs while making sure that employees remain productive. Virtual and mobile learning can have an enormous impact on the bottom line through reduced costs from training away-days, greater productivity among the workforce, and a leveraging of the technology to foster more effective and collaborative means of working together. Furthermore, with the demand-driven learning we are seeing today, the 'anytime, anywhere' mantra is particularly compelling.

In addition, there are the changing demographics of the workforce which is spurring such technologies on with a variety of innovative new solutions being developed by companies to meet these challenges. Examples include PIXELearning (www.pixelearning.com) and Soshi Games (www.soshigames.com/) in serious gaming.

Mobile learning is also seeing continued growth with companies, such as Microsoft, empowering sales representatives to share and consume their sales and technology expertise using multimedia podcasts, such as mobile phones, PDAs, or other media players to produce and/or consume audio and video.

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Serious gaming has increased from 15% in May 2010 to 24% in May 2011 ...

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The Finance Game from PIXELearning

Learners are placed in a fictitious scenario involving a medium-sized, underperforming mountain bike manufacturing company, in desperate need of help. The learners can see the previous two years historical trading figures (sales figures, profit & loss, cash flow and balance sheet). They are also then given performance targets to achieve over the next three years.

The game's underlying equations have been based on a sophisticated model. This gives the game-play an 'intelligent' responsiveness to the marketing decisions made by the user. Because the results are logical, the game is surprisingly easy to use, yet there's enough complexity to keep people interested; there are no simple solutions.

This serious game features a very detailed profit and loss, cashflow and balance sheet model. Management accounts are generated each month and then annual accounts are 'filed' at the end of each completed year. Key financial ratios and performance indicators illustrate relative performance measures. This exposes learners to financial terminology and concepts in a realistic and meaningful way (for example 'P&L' and 'ROCE') encouraging learners to see the purpose and benefits of tracking such measures.

All decisions cause realistic, logical business outcomes, e.g. falls in market share when prices are increased sharply allowing learners to understand the interdependencies of various business concepts.

As they practice and strive to achieve the in-game targets that they have been set, they will quickly begin to grasp the sensitivities of each factor (e.g. the importance of working capital) and be able to understand the interdependence of the different aspects of the business from a financial standpoint.

7.2 E-Learning & Virtual Classes

The survey also looks at e-learning. While the numbers appear quite drastically down from the May 2010 survey (74% to 46%), one of the reasons for this is the spreading out of learning into other areas, such as virtual classes, serious games, and mobile learning, which in many cases are facilitated by e-learning in the first place.

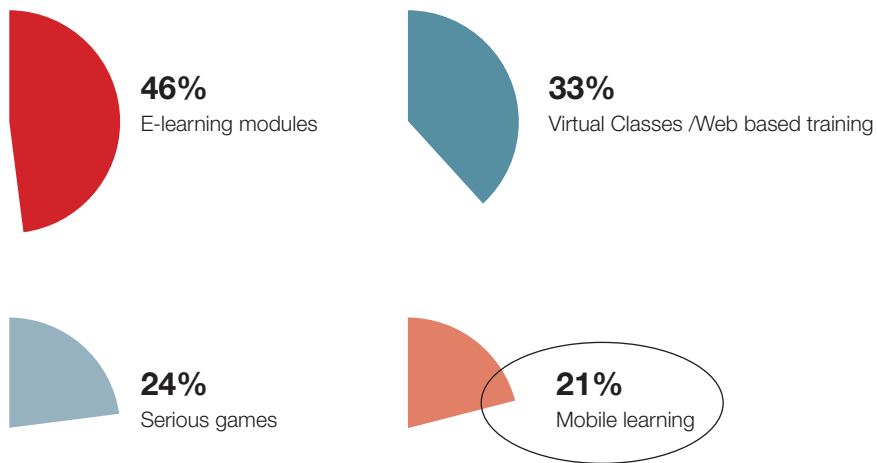
Virtual classes and environments is an interesting development with one out of every three employees being exposed to this medium. A number of virtual learning environments have come to the fore over the last few years, such as Second Life (www.seconddlife.com), viewed by many as the initial exponent; Reaction Grid (www.reactiongrid.com); and VenueGen (www.venuegen.com). All these environments have numerous potential applications for L&D and as a means of fostering collaboration across what are often global communities.

In terms of comparisons with other regions outside Europe, the Bersin 2011 Corporate Factbook notes that "over the past two years, more companies have turned to virtual classroom instruction", although the report goes on to say that "transition is not always an easy one, as organisations often find it difficult to attain a truly interactive and engaging experience with a group of remote, widely dispersed learners."

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Virtual classes and environments is an interesting development with one out of every three employees being exposed to this medium.

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Younger employees and supervisor / management levels have the most access to these methods.

It is the **medium sized** European organisations driving the use of these tools

Figure 15: Modes of distance learning trained employees are using

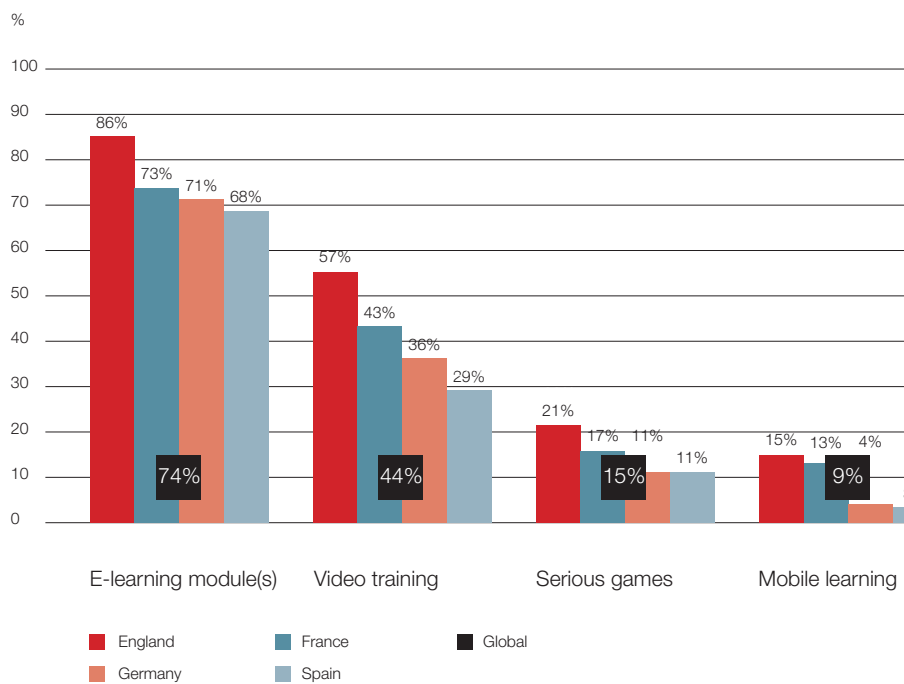


Figure 16: Modes of distance learning trained employees were using when surveyed in 2010

7.3 Collaborative Learning Tools – Video, Wikis, Blogs, Forums & Podcasts

What about collaborative and informal learning tools?

Figure 17 asks what tools have been used for training over the last three years and finds that half of those trained in Europe have used informal learning tools such as videoconferencing, wikis, blogs, forums and podcasts.

Most of these tools, however, are in the low 20's indicating that companies are still testing them. Interestingly, it is larger European companies that are using collaborative learning tools but this may change with the rise of open-source and free software.

It is worth pointing out that videoconferencing is taking the lead here (33%) with standard packages, such as Cisco's WebEx or Microsoft's Live Meeting, not only being used as tools for online meetings but also for active training.

The last few years has seen a number of new applications such as a new Adobe application for I-Phones which enables users to conduct webinars on one's mobile, and web sites, such as www.livematrix.com, which people can use to access HR and learning topics of interest. All these sites are helping move informal learning forward.

Outside Europe, informal learning is increasing significantly as well. According to Bersin again and the 2011 Corporate Learning Factbook, "many forward-thinking L&D organisations in the US are shifting their focus away from company-driven, formal learning programmes to support the natural flow of learning across the organisation through social and informal learning environments."

Bersin found that 30% of US companies spent money in 2010 on informal learning tools or services with large companies making the heaviest investments, spending approximately \$16,000, on average, during 2010.

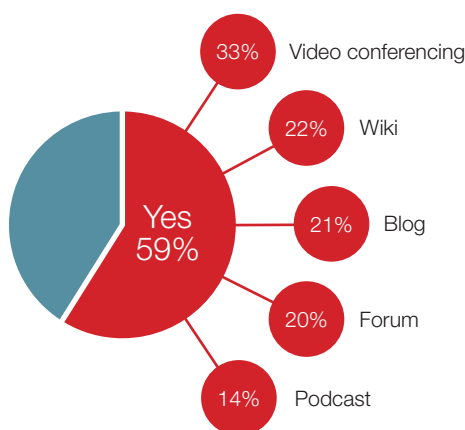


Figure 17: Collaborative tools used by trained employees in the last three years

One of the biggest changes in the delivery of L&D over the last few years here is the transition from formal to more informal methods of learning. What is clear from our survey, however, is that European organisations are taking a responsible approach, incorporating new forms of learning to operate alongside more traditional structures in order to create a 'perfect mix' in L&D today.

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Outside Europe, informal learning is increasing significantly as well.

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8. THE EFFECTIVENESS OF TRAINING; EVALUATION; AND POSITIVE DEVELOPMENTS IN TRAINING CITED BY EMPLOYEES

So how effective is training today? Is it meeting the needs and demands of today's learner and are companies supporting the employee in regard to providing effective learning support?

8.1 Company Support and Perceived Success of Training

When employees were asked whether their company has put in place the necessary structures for training, such as the identifying the competencies the company needs, providing communication to employees on the development of their roles, and allowing managers to track the progress of training, the answers were general positive, with around 70% of respondents strongly or partly agreeing with the questions posed (see figure 18).

Figure 19 asked employees to rate the success of their training with the results very positive. 95% of employees said that they strongly or partly agreed that they had gained useful information for their day-to-day work; 90% said that they had acquired new professional practices that could be applied to their job; and 89% said that they were given the opportunity to implement what they had learned in training sessions. Slightly lower was that only four out of five (83%) respondents said that the training would contribute to their own professional development, with this figure lowest in France. The figures demonstrate that training remains highly effective and is meeting the needs of learners to a large degree.

When compared to our May 2010 survey, there is little marked change with the results then almost overwhelmingly positive as well, with 94% of employees satisfied with their training; 90% able to put into practice the skills and knowledge acquired from the training; and 80% believing that what they learn will contribute to their personal development.

Despite all the potential difficulties training is facing, particularly with budget cuts and despite the increased demands of the learner, it is clear that training is still delivering to learners – a tribute to its effectiveness and versatility within organisations.

Do you consider that your company puts into place all the means for:

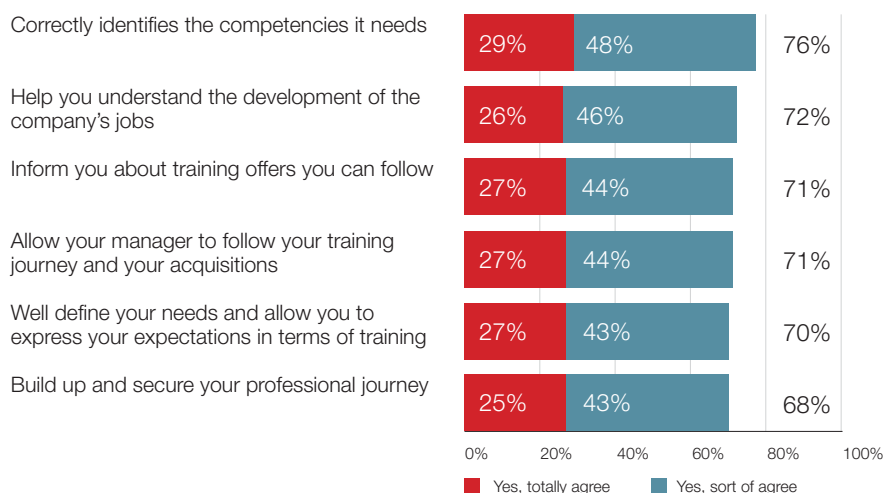


Figure 18: Structures in place for training in Europe

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Outside Europe, informal learning is increasing significantly as well.

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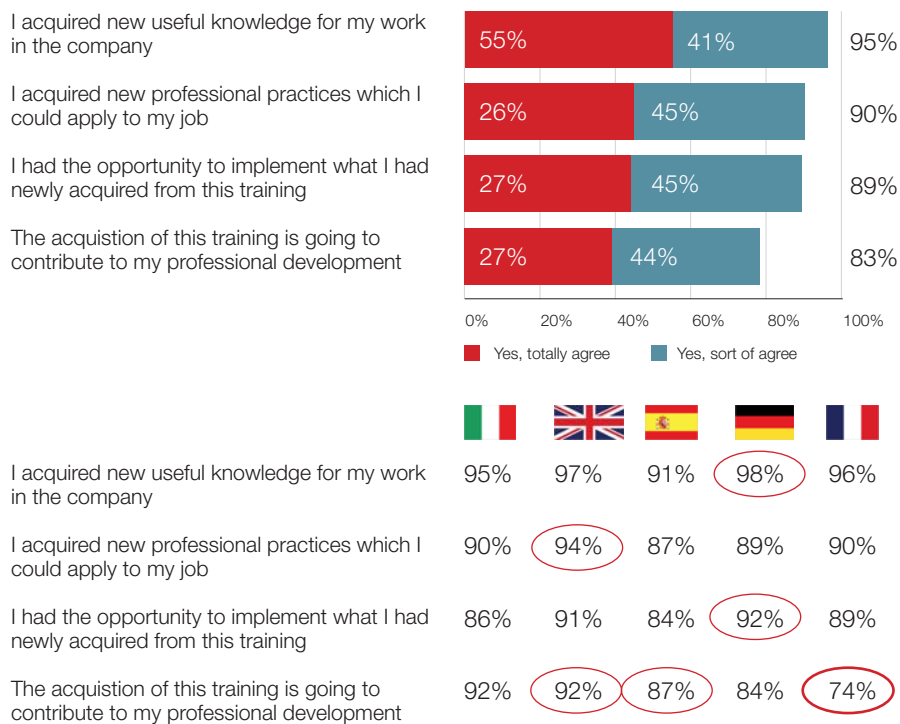


Figure 19: How trained employees are using their training

8.2 The Evaluation of Training

The survey also asked employees whether they felt that there should be more evaluation of their training, less, or it should remain unchanged. The results in figure 20 saw pretty much an equal split across the different means of evaluation – from evaluating what employees have been able to apply from training through to the evaluation of training that has actually been acquired and the evaluation of employee satisfaction towards the training.

Conclusions that can be made here include the fact that learners appreciate the need for training to be evaluated with nearly half of all trained employees surveyed wanting more evaluation of training, most of the other half satisfied with the status quo and very few learners wanting less training evaluation.

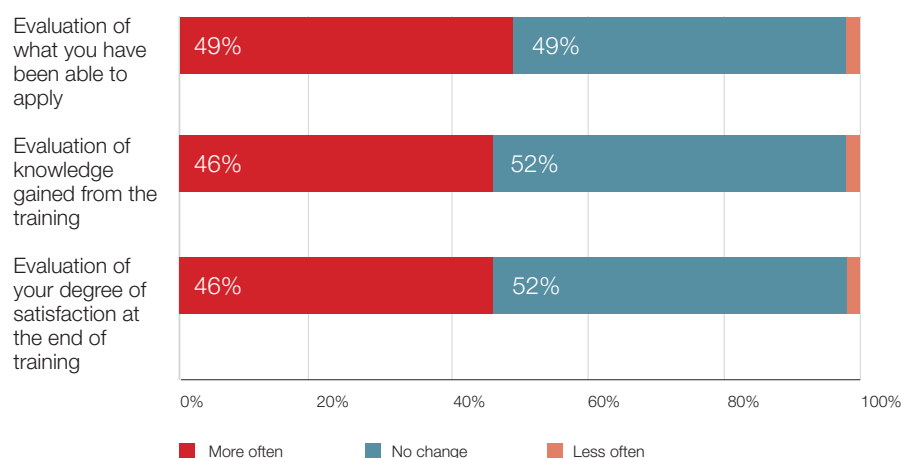


Figure 20: How trained employees want training evaluation practices to change

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Conclusions that can be made here include the fact that learners appreciate the need for training to be evaluated with nearly half of all trained employees surveyed wanting more evaluation of training,

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8.3 What Employees Perceive to be Positive Developments in Training

Figure 21 asks employees to cite what they consider to be recent positive developments towards training.

Access to training is mentioned by 76% of Italian employees and 58% of French employees. The effectiveness of training is cited by 77% of Italian employees and 63% of German employees. The positive impact of training on one's career is referenced by 69% of UK employees and 53% of French ones. And finally, the fact that the company in question is interested and committed to training by 66% of Italian employees followed by over 50% of employees from UK, French and Spanish companies.

Have you observed any positive changes over the last few years as regards the following points?:



Figure 21: What employees consider to be recent positive developments towards training

This illustrates, as do other figures in our survey, that there remains a very positive attitude towards training throughout many European organisations as to its effectiveness, how it is accessed, and how it contributes to one's career.

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Conclusions that can be made here include the fact that learners appreciate the need for training to be evaluated with nearly half of all trained employees surveyed wanting more evaluation of training,

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9. THE GROWING GAP BETWEEN THE TRAINED AND UNTRAINED

The survey to date has focused just on the answers of those who are trained. But what about those who are not enjoying the benefits of training today? Do they know why they are not being trained, for example? Have they even asked for it? And are we seeing a gap between the trained and untrained?

As figure 22 illustrates, our survey found that nearly a quarter of untrained employees do not know why they have not had any training in the last three years and a staggering 89% have not even asked anybody for it.

What conclusions can be drawn here?

The fact that one in four of untrained employees don't know why they have not had any form of training points perhaps to a communication issue on the part of their managers or L&D/HR departments. While we don't have the data to strip this down into age groups, it would be interesting to see whether those who don't know why they haven't been trained are from older generations. The millennials, who are entering the workforce, for example, tend to be quite strident in asking for things they believe they are entitled to.

The fact that 89% of untrained employees haven't asked for training over the last three years also points to a certain acknowledgement or apathy that they are unlikely to receive training even if they ask. Do employees simply not ask because they know what the answer will be? Why hasn't the HR or L&D departments got a greater degree of control over this?

24% of untrained employees do not know why they have not had training in the last 3 years

89% of untrained employees have not asked for training in the last 3 years

Figure 22: Characteristics of untrained employees

Figure 23 goes further in comparing the attitudes of the training and untrained with a clear divergence in approaches to training.

For example, employees across Europe who have received training in the past are highly motivated to further develop their skills in the current economic climate – so much so that 79% are willing to give up their free time to undertake training and 61% are even prepared to part fund it.

In contrast, untrained employees are less likely to want to train outside working hours (63% versus 79%) and much less likely to be prepared to part fund it (31% versus 61%).

The difference between these two groups is widening as compared to our May 2010 survey where 76% of the trained and 65% of the untrained were willing to work outside working hours and 53% of the trained and 38% of the untrained were willing to fund their own training.

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These results are hardly surprising in that it is unlikely that those who are untrained are going to be that committed to training if they haven't even experienced it. What the results do indicate, however, is the power of training and how it can result in employees being much more engaged and willing to go the extra mile to achieve it.

On the downside, if some employees are training and others aren't, it points to potentially negative dividing lines within organisations. While it is understandable that high achievers should perhaps receive more bespoke training as part of company-wide talent management programmes, to leave some employees with no training at all is cause for concern.

The results also illustrates how much employees are now more willing to take control of their own learning – the demand-driven approach to learning that has been a constant theme throughout this paper.

This demand-driven approach goes alongside the potential disenchantment with the L&D function in providing the training employees want – a potentially dangerous division.

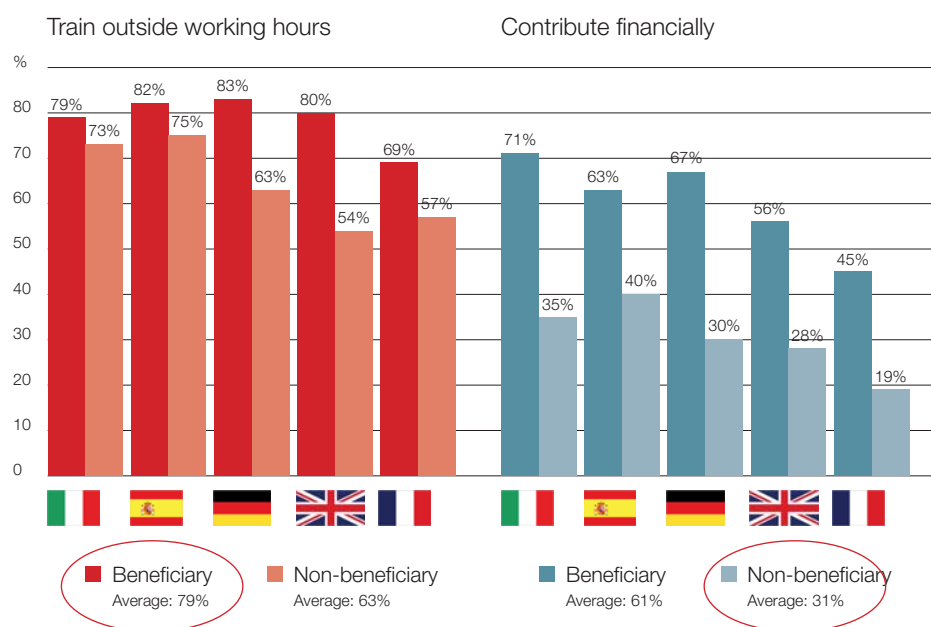


Figure 23: Willingness of trained and untrained employees to train outside working hours or contribute financially to their training

This is perhaps best illustrated by our 2009 research and the results illustrated in figure 14 earlier in this paper, where a gap could be clearly detected between what employees like and want, and what HR professionals are actually planning to develop over the next three years.

For example, half of employees across Europe want more e-learning and blended learning compared to 40% of HR professionals; 44% of employees want to see collaborative techniques developed compared to under a third (32%) of HR professionals; and face-to face learning is more popular among the human resources function with 42% of respondents wanting to see more classroom learning compared to 38% of employees.

This growing disconnect between HR and L&D departments and learners is cause for significant concern. History has shown so often in the past that organisations and groups of people that don't keep up with the needs of their target audiences and customers are confined to history themselves. It has never been more important for L&D professionals to front up, embrace change, and provide leadership to learners, managers and organisations as a whole.

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... half of employees across Europe want more e-learning and blended learning compared to 40% of HR professionals ...

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10. 2011 AND BEYOND

The final section of our survey asked employees to look ahead as to the different training methods they wish to see deployed this year.

As has been clear throughout this paper and as illustrated in figure 24, new forms of technology-based training are far from displacing the older forms of training, with on the job, face-to-face and coaching all leading the way as preferred training modes during 2011. On the job training and face to face learning are in fact slightly up on the May 2010 survey with On the job – 90% versus 89% in 2010; and Face to face – 90% versus 87% in 2010.

Training today is about providing a personal mix of training to suit the needs of learners and non-learners, with the mix continuing to be modified but the human touch remaining prominent.

Again, there is a marked difference between the desires of the trained and non-trained employees, particularly in the area of technology-based learning, such as e-learning, wikis and serious gaming, where there is a much stronger demand among the trained to embrace these delivery vehicles. A probable reason for this is that the untrained simply haven't experienced them and are more likely to call for traditional forms of training, such as on-the-job and face-to-face, as they are more aware of these.

Finally, figure 25 asks employees what different subject areas training should focus on moving forward with both trained and untrained employees viewing more job related skills as their highest priority at 62% and 45% respectively.

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Training today is about providing a personal mix of training to suit the needs of learners and non-learners, with the mix continuing to be modified but the human touch remaining prominent.

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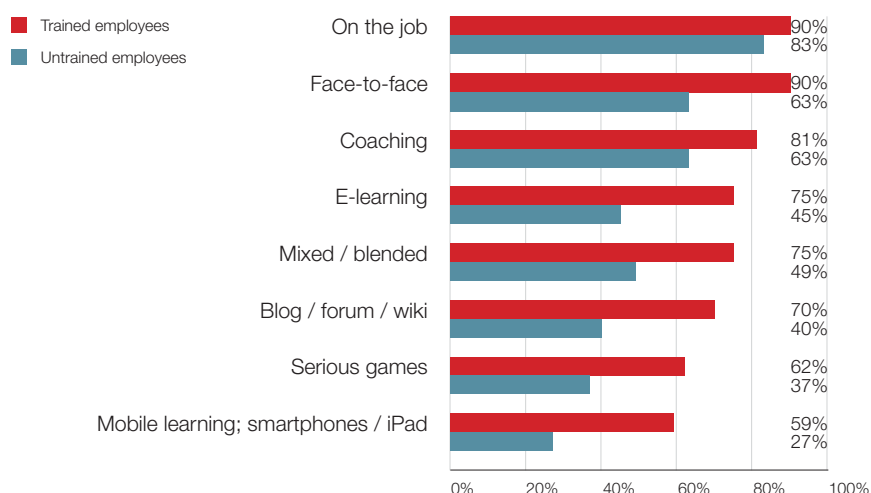
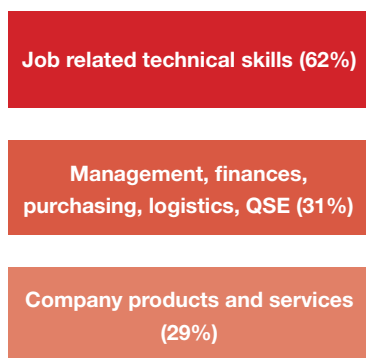


Figure 24: Training modes that trained and untrained employees would like to use in the near future

For those trained



For those not trained

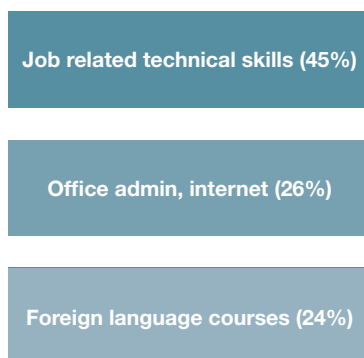


Figure 25: Areas trained and untrained employees want to benefit from in the near future

What our survey shows is that learning today is clearly at a crossroads. Who do I go to for training information? Who do I go to for help with my training itself? Do I have enough confidence in my managers to be able to carry this out?

Learners, non learners, L&D/HR professionals and line managers are all in need of help, support and guidance in their enactment of training today. Similarly, they are all in a position to take the lead and be proactive. What our survey demonstrates, however, is that it is only learners who are taking this lead – mainly due to the leadership vacuum in regard to training elsewhere in the organisation. Too many groups are responding rather than leading.

Learning today needs to be at the heart of the strategic leadership of organisations and L&D needs to be at the heart of commercial and operational strategies. This would provide clarity to the role of L&D and HR, free up their inhibitions and feeling of following rather than leading, and also help provide a focus for future managers who will be as much a part of the future learning agenda of their organisations as the employees who work and report to them.

The result will be a significant impact on the bottom line with the retention of top talent and human capital being a key line item on the company balance sheet and a significant driver for future financial growth.

11. CONCLUDING THOUGHTS

With the demand for increased value from training, the changing make-up of today's workforce and company structures, learning has undertaken some dramatic and probably irreversible shifts over the last few years. As mentioned previously in the survey, points we can take away include that:

- Emerging learning tools are growing in popularity and are enhancing traditional methods rather than replacing them.
- Traditional training is not being driven into extinction. Learners want a complete mix which complements the learners' training preferences and how they work.
- The human touch is more important to the learning population than ever.
- Employees turn to their manager for information about training but to expert coaches/tutors for the training itself. Do managers need more training? Is L&D being bypassed? What can L&D do to gain greater visibility? These are all questions that need to be asked.
- And there are key differences in attitudes towards training between the trained and the untrained and the different generations in the workforce. L&D must listen to learners' needs and ensure training is personalised and reflects the changing demographics and cultures within today's global marketplace.

What is clear, though, is that training remains a highly respected and effective business function which is now moving from a supply-driven to demand-driven business model. We look forward to tracking further changes and developments in L&D in 2012.

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13. ABOUT CEGOS GROUP

Cegos Group, established in 1926, is today the European leader in professional education and one of the major global players. Its consultants have expertise across all subject areas including human resources, management and leadership, performance and organisational skills, individual and team performance, marketing and commercial, project management, and deployment of large training systems internationally.

In 2010, Cegos Group achieved sales of 176 M€ and trained more than 200,000 staff in Europe and internationally. Cegos' Global Learning programmes are mastered by 350 certified trainers in 20 countries. Cegos employs 1,200 consultants and has a presence in 30 countries through subsidiaries or partners. During the past three years, 500 projects have been delivered internationally in over 50 countries across a full range of personal and professional development topics.

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14. ABOUT JEREMY BLAIN

Jeremy Blain is a Director of Cegos SA, and is responsible for Cegos' strategy for international expansion through a value adding Global Distribution Partners Network.

An L&D entrepreneur responsible for growing Cegos' business worldwide through a network of distribution partners, Jeremy has 10 years experience in the industry as a managing director, partner, trainer, coach and programme author. In previous roles at Procter and Gamble, Pepsico and as CEO of his own business, Jeremy's background includes marketing, sales, operations and account management.

Jeremy is a frequent international conference speaker and media commentator on topics related to the global L&D market. Themes include: the integration of emerging and informal learning technologies; the importance of performance measurement and proving ROI; developing 'core' leadership, management and commercial skills to achieve competitive business advantage; and change management and how to implement successful international training strategies.

For more details, debate or discussion, you can find Jeremy on LinkedIn <http://uk.linkedin.com/in/jeremyblain> and also on Twitter at <http://twitter.com/learntheplanet>

Jeremy has also published a series of white papers on issues relevant to L&D. These are still current and available, and include:

- 'Exploring and Interpreting the Most Important Learning Trends across the Globe', May 2010
- 'Informal Networks – How They Are Changing the World of Work', December 2010
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