

Cegos 2024 International Barometer

Transformations, Skills and Learning



As an international leader in Learning & Development, the Cegos Group is committed to **supporting organizations and their teams through the many transformations** (technological, societal, environmental, managerial...) they are facing today.

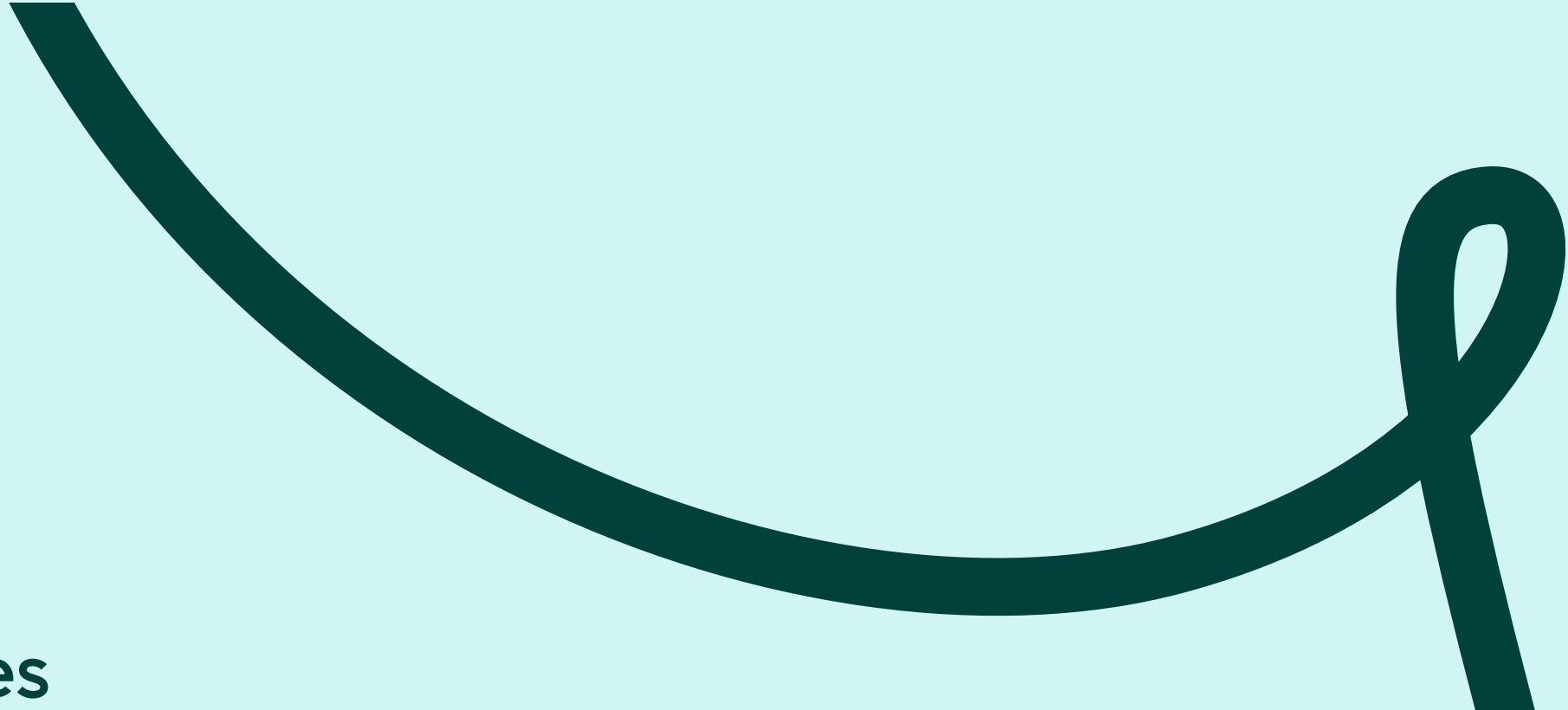
In this 2024 international barometer edition, Cegos aims at understanding and decoding:

- **The priority transformation issues (especially those linked to the explosion in Generative Artificial Intelligence and Data)** impacting skills according to HR and Learning & Development professionals.
- Employees' vision of their **employability** and their expectations and concerns in terms of skills development.
- **The fields and modalities of training expected** by organizations and employees in the future.

The 2024 survey was carried out in June 2024 in **9 countries in Europe** (France, Germany, Italy, Portugal, Spain), **Asia** (Singapore) and **Latin America** (Brazil, Mexico, Chile). This edition polled 5 000 employees et 469 Directors or Heads of Human Resources / Directors or Heads of Training, all working in private and public sector organizations with 50 or more employees.



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Key figures

Accelerating technological change lies at the heart of the skills challenge

- **63% of HRDs think that the skills challenges** of the next two years are **linked above all to technological change and in particular to artificial intelligence and data.**
- 76% of employees believe that **the current transformation challenges (technological, climatic, societal, etc.) will change the content of their work.**
- 31% of them think that **these changes could make their job disappear.**
- According to HR managers, 19% of jobs in their organisation are at risk of **skills obsolescence** in the next three years.
- **Developing skills in relation to the ecological transition is still lagging behind** (29% at the global level).
- As far as **soft skills** are concerned, 39% of employees want training **to gain efficient work organisation**, 36% in **creativity** and 33% in **agility**.

Skills development is a shared strategic challenge

- 78% of employees and 90% of HR decision-makers believe that **skills development is a strategic lever for their company/organisation.**
- 63% of employees think that **skills development is a responsibility equally shared between the company and the employee.**
- **92% of employees say they are willing to train themselves** in order to adapt to the way jobs and professions are changing or will change.
- 58% of employees are **prepared to finance part of their training costs.**

Organisations face the 'time to competency' challenge when it comes to training properly and just in time

- HRDs consider their **organisations to be fairly agile** in meeting the 'time to competency' challenge, with an average satisfaction score of 7.2/10.
- 44% of HR managers find it **difficult to match the training offer with the skills needs of their company** (+3 points vs. 2023).
- 43% of employees declare **the response to their training needs often comes late.**

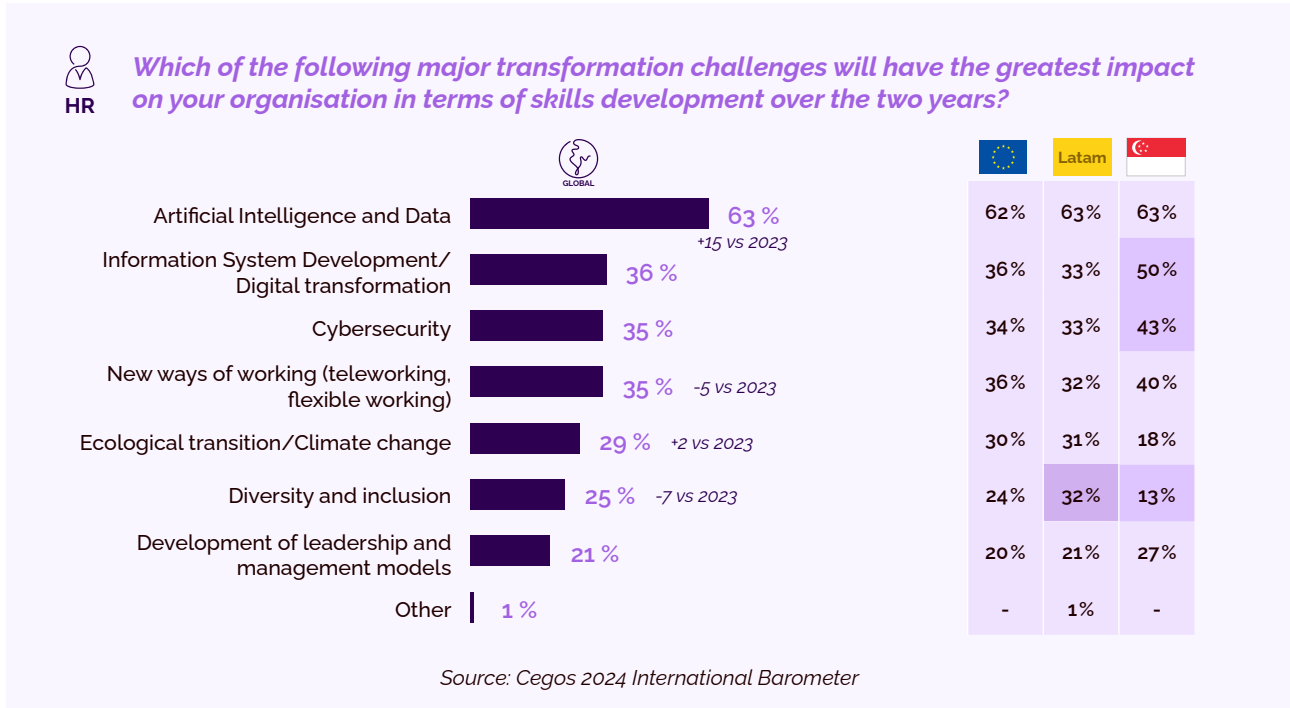
The existing training systems, what is expected and what could change thanks to artificial intelligence

- 46% of training courses are **remote** and 57% of them in a **synchronous** mode.
- 52% of employees are calling above all for **on-the-job, interactive/fun** (42%) and **tailored to individual needs** (38%) training.
- 49% of HRDs place **e-coaching** at the top of the list of new training methods used or to be used in the short term.
- **Artificial intelligence is making its entry into training:** 44% of employees have already used generative artificial intelligence to learn, while 81% of HRDs have already used it or are planning to use it, in particular to individualise courses.

Accelerating technological change lies at the heart of the skills challenge

Tomorrow's skills challenges are mostly linked to technological change

Throughout the world, technological evolutions are the major challenge facing companies. And for HR Directors and HR Managers, they are having a major impact on the development of employee skills. When asked about the changes that will impact employee skills over the next two years, HR managers unsurprisingly quote **artificial intelligence** and **data** first (63%, +15 points vs. 2023). In second and third place in terms of the changes that will have an impact on skills, HR managers rank **information systems development** (36% overall) and **cybersecurity** (35%).



The omnipresence and acceleration of technological developments is having an impact on employees, with **38% stating that they feel overwhelmed by technology** (24% in France and up to 51% in Singapore). This feeling is lower in companies with more than 2,000 employees (34%) and higher in the public sector (41%).

While new ways of working continue to challenge teams' skills, the issue is less significant than last year (35%, -5 points vs. 2023). It seems that companies have gradually integrated these methods into their organisation.

Although it has risen slightly, the ecological transition is still not one of the training priorities of international HRDs (29%). This is particularly true in Singapore (only 18%). These results may illustrate their difficulties in incorporating this urgent issue into their Learning & Development strategy.



Transforming the content of work or making jobs disappear: current evolutions continue to shake up employees

Against a backdrop of accelerating change (technological, climatic, societal, etc.), **76% of employees anticipate a change in the content of their work**. This feeling is stronger among managers (83% vs. 78% in 2023).

Another striking feature of the survey is that **31% of employees, particularly blue-collar workers (38%), expect their job to disappear**.

Moreover, **27% of employees believe that they no longer have, or soon will no longer have the necessary skills they need to do their job properly**.

That's why they are taking action: **32% of employees say they are personally involved in developing their skills**. Portuguese employees are even more committed to training themselves (40%).

27%

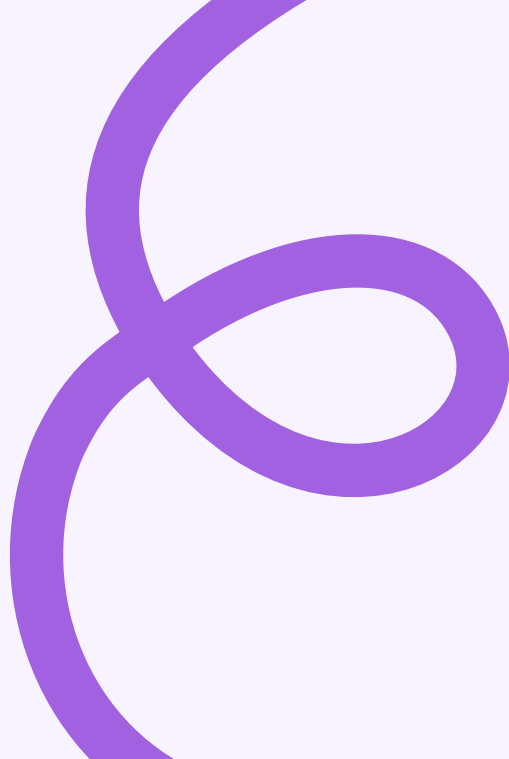
of employees believe that they no longer have, or soon will no longer have the necessary skills they need to do their job properly.

38%

declare they feel overwhelmed by technology.

32%

of employees say they are personally involved in developing their skills.



HRDs focus on developing employees' skills in their current positions

HR managers are more optimistic: they think **only one job in five presents a risk of skills becoming obsolete in the next three years**. This risk remains stable compared to last year.

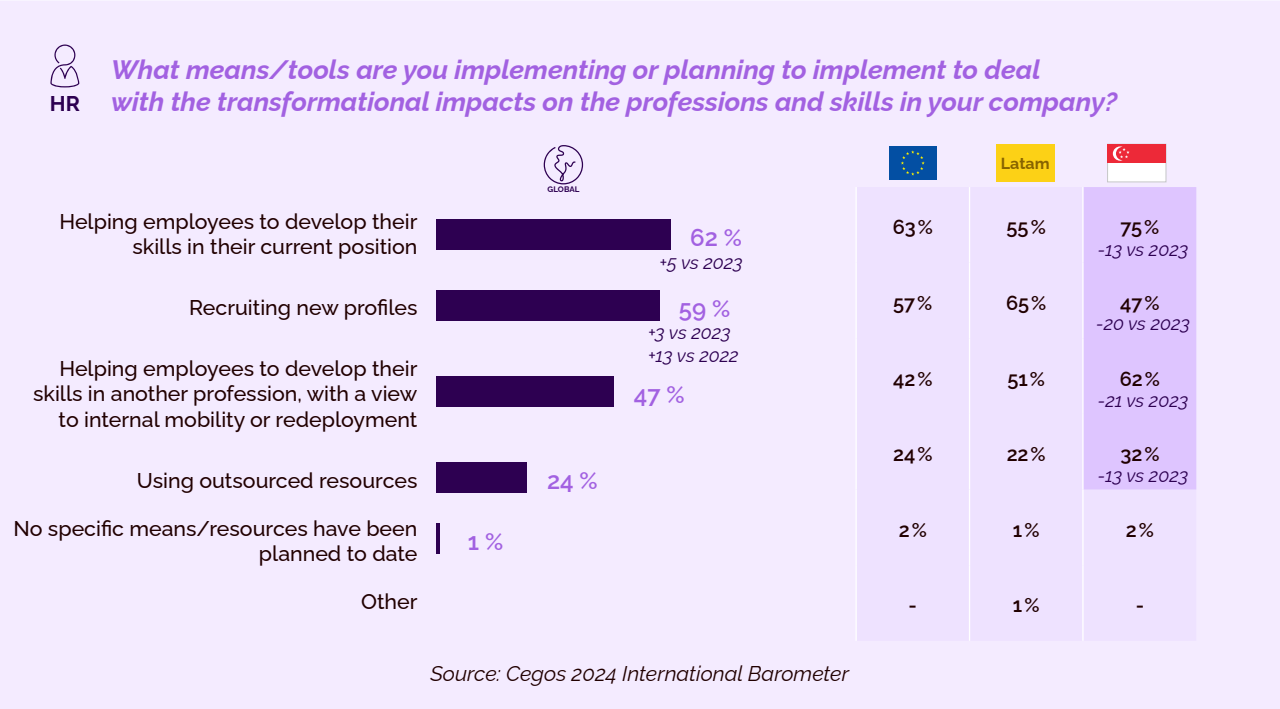
Singapore HRDs seem to be more concerned about future obsolescence (27%).

To cope with the impact of the changes underway, HR departments are giving priority to:

- **Up-skilling employees in their current position** (62%, +5 points on 2023), particularly in France (77%, +15 points vs. 2023).
- **Recruiting new profiles** (59%), which they have been using increasingly over the past two years (+3 points vs. 2023, +13 vs. 2022).

On the other hand, **career transition support is lagging behind** (47%), with treatment that remains ad hoc and individual.

It is interesting to note that Singapore HR seems less eager to set up dedicated actions to develop skills in the face of the changes underway.



For HRDs, the need to strengthen digital skills must go hand in hand with the development of soft skills

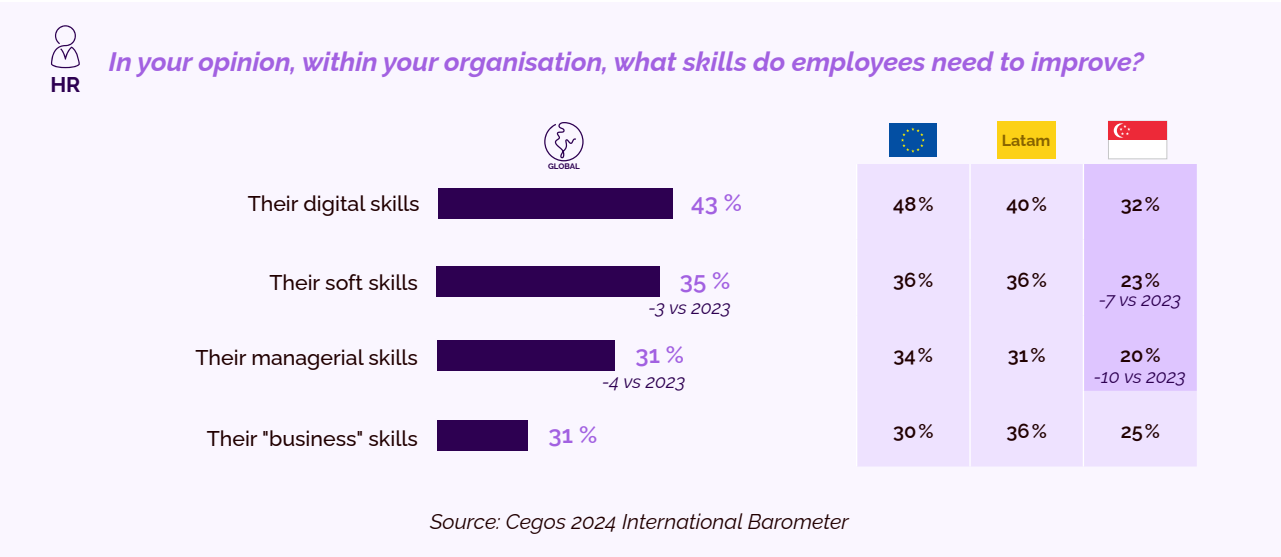
HR professionals have taken on board the challenges of technological transformation: according to **43% of them, employees' digital skills must be consolidated first**.

This is followed by soft skills (35%) on which employees and HR managers have slightly different expectations:

- **Employees want training to be more efficient in their work organisation** (39% and up to 45% in Italy), probably to cope with a hybrid work environment and with the multiplication of information flows. They also want training in **creativity** (36% overall, 45% in Brazil) and agility (33%, 46% in Singapore).
- As they are facing the accelerating pace of change, **HR managers are focusing on agility and adaptability (49%), particularly in Mexico (60%)**.

Developing managerial skills is expected, but is slightly behind (31%, -4 points on 2023), especially in Singapore (20%, -10 points).

It should be noted that strengthening business skills comes last (31%).





Developing digital skills
is the priority according to

43%

of the HR managers.

This is followed by soft skills,
for

35%

of them.

Christophe Perillhou, Director of Learning & Solutions at the Cegos Group, explains:

“According to HR decision-makers, the explosion in generative artificial intelligence is the key issue in skills development. There are many training needs in this area, and at Cegos we are responding in 3 complementary ways:

Firstly, by offering AI training for everyone, with the aim of raising awareness and using this technology as a lever to increase working effectiveness.

Secondly, training courses that use AI as a design and productivity assistant for business activities (marketing, communication, sales, HR, etc.).

Finally, AI training for specialists. Demand is very fast and very strong: some of the courses Cegos launched in early 2024 are already bestsellers.

As a corollary to this AI training, soft skills such as critical thinking, creativity or agility are proving increasingly crucial. Those are the human skills that will guarantee the relevant, secure and ethical use of technologies.

CSR (corporate Social Responsibility) training, which is related to all aspects of sustainable development, is both a surprise and a wake-up call. It is slowly gaining ground and we are witnessing an accelerating demand for packaged/individual training.

But we also note that despite the urgent changes to be made and increased regulatory pressure, organisations are still carrying out few major training projects on themes relating to all aspects of sustainable development. Let’s bet that these needs will grow, in line with the European CSRD directive and the absolute need to involve all business lines in a responsible performance approach.”

Skills development is a shared strategic challenge

It is a strategic lever, equally shared by the company and its employees

Is skills development a strategic lever for companies and organisations? The answer is yes for 78% of employees (83% in Latam countries) and 90% of international HR decision-makers.

The respondents also agree on the partnership dimension of skills development: for 63% of employees (72% in Portugal and 71% in Chile) and 66% of HR managers, it is a responsibility equally shared between the company and the employee.



Employees are strongly committed to developing their employability

The proof of this shared responsibility is that 92% of employees say they are prepared to undertake their own training to adapt to the way jobs and professions are changing or will change (and even 96% in Latam countries), and 58% are prepared to finance part of their training (76% in the European polled countries).

92%

of employees say they are prepared to undertake their own training.

58%

are prepared to finance part of their training.



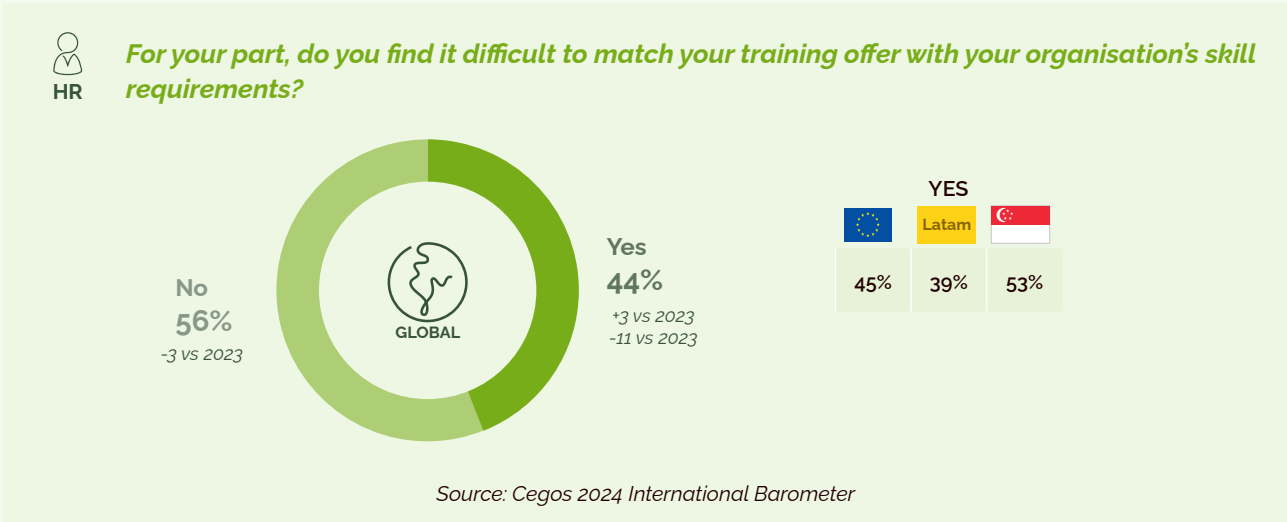
Organisations face the ‘time to competency’ challenge when it comes to training properly and just in time

Just-in-time’ training: HR departments vacillate between the agility they claim and the difficulties they are experiencing

Responding to employee training needs quickly and on the fly is a major challenge for organisations. To remain competitive, they need to ‘train just in time and just right’, using training systems that are both responsive and flexible.

With an overall average score of 7.2/10, HRDs consider their organisations to be fairly agile in responding to this ‘time to competency’ challenge. This score is even higher in Latam (7.8/10).

However, in practice, 44% of them admit that they are finding it difficult to align skills requirements with their training offer (+3 points vs. 2023). Only HR managers in companies with more than 2,000 employees fare slightly better, with only 36% sharing this view. In France, only 27% of HR managers say they are experiencing these same difficulties (down 10 points on 2023).



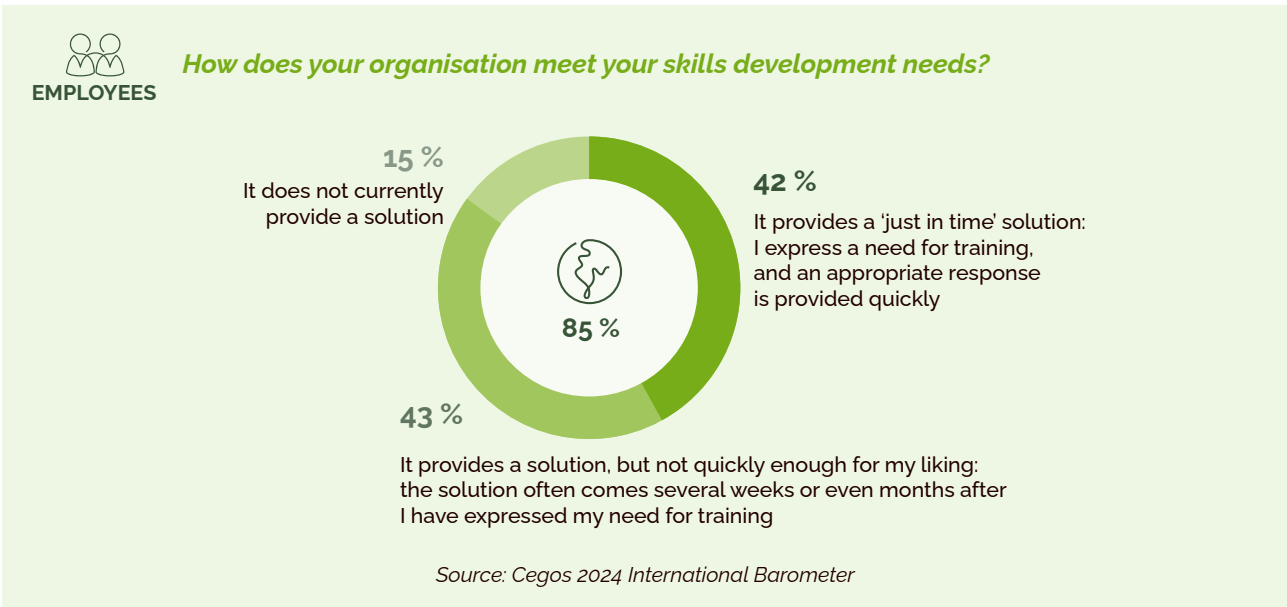
43%

of employees declare that the training responses provided by their company often arrive late.

Responses to employees' training needs still lack responsiveness

The difficulties cited by HR decision-makers have an impact on the employee experience: 43% of employees declare that the training responses provided by their company often arrive several weeks or even months after they have expressed their needs.

And 15% of them believe that their company simply does not provide any solution. This proportion rises to 20% among blue-collar workers and 18% in the public sector.



Christophe Perilhou, Director of Learning & Solutions at the Cegos Group, comments:

“HR and Training Departments’ challenge is to keep on innovating in the design and roll-out of the programmes they offer employees: they need to combine high-quality on-the-job training, courses that meet individual needs and a rich experience.

Part of the answer lies in ‘time to competency’. At Cegos, we have identified three key levers to meet this challenge:

First, we are strengthening our range of high-quality asynchronous training solutions, with learning paths that enable users to take an active, quick and ‘just in time’ role in their own development.

Secondly, we are helping L&D teams to become more agile and to move faster: we are running more and more design thinking-inspired workshops, known as Learning Design Sprints, in order to design a new training product in two days.

Finally, we are expanding our range of ‘on the job’ training courses to support performance in everyday working life.”



What the existing training systems are, what is expected and what could change thanks to artificial intelligence

Remote learning has become an integral part of training practices. E-coaching and adaptive learning are on the rise.

Boosted by the health crisis of 2020, remote training now accounts for 46% of all training courses, synchronous training being the preferred method at 57%.

46%

of training courses are remote.

57%

of HR staff prefer synchronous training.

As a corollary to remote learning, e-coaching is on a roll: 49% of HR managers, particularly in companies with more than 2,000 employees (59%), use it or intend to do so in the short term. This trend is stronger in France (60%, +22 points vs.2023) and much weaker in Singapore (30%).

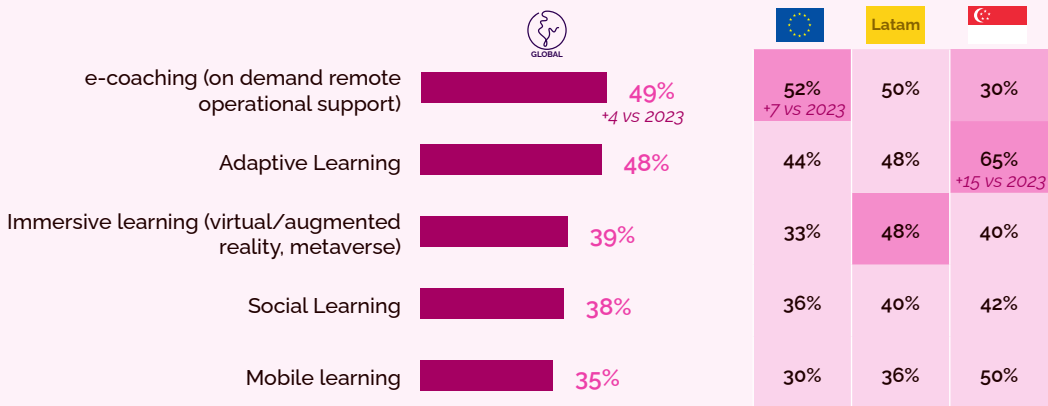
Adaptive learning (integrating AI-based technologies to offer personalised training) comes in second place (for 48% of HRDs), particularly in Singapore (65%, +15 points).

Immersive learning is used in a greater extent in Latam countries (48%).

These training methods illustrate the desire to support employees in an increasingly individualised way.



Which of the following new type of training do you currently use or plan to use in the short term? (choose the 3 priority types)



Source: Cegos 2024 International Barometer



Employees and HR managers agree on the changes that need to be made to training courses: they need to be even more 'on-the-job', more fun and more individualised

Above all, employees expect training programmes to give priority to on-the-job situations (52%, 63% in Chile) so that they can transfer what they have learned to their day-to-day work.

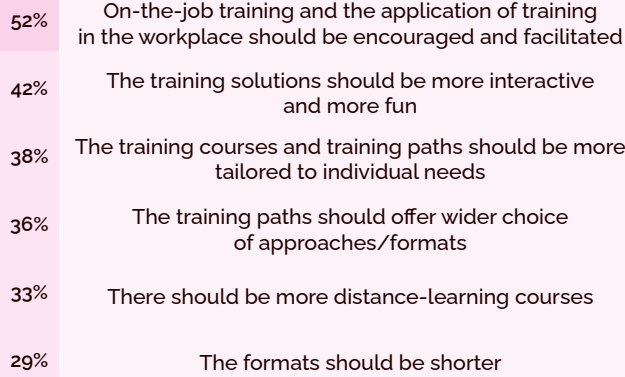
They also expect training to be more interactive and fun (42%), but also more personalised (38%).

These wishes are well taken into account by HRDs, who place individualisation (44%) and above all the interactive and fun dimension (49%, +13 points on 2023 but only 32% in Singapore) at the top of the list of changes to be made to their training offer. These are all key factors in facilitating and maintaining employees' commitment to their training.

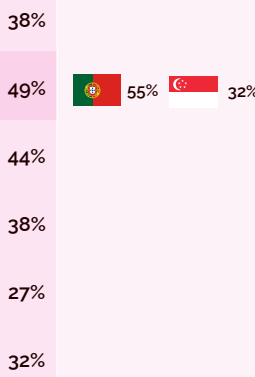


What changes should be made to the training courses provided by your company in order to better develop your skills?

46% 60% 63%



In your opinion, what kind of changes need to be made to your training courses?



Source: Cegos 2024 International Barometer



44%

of employees say they have already used gen AI to learn.

18%

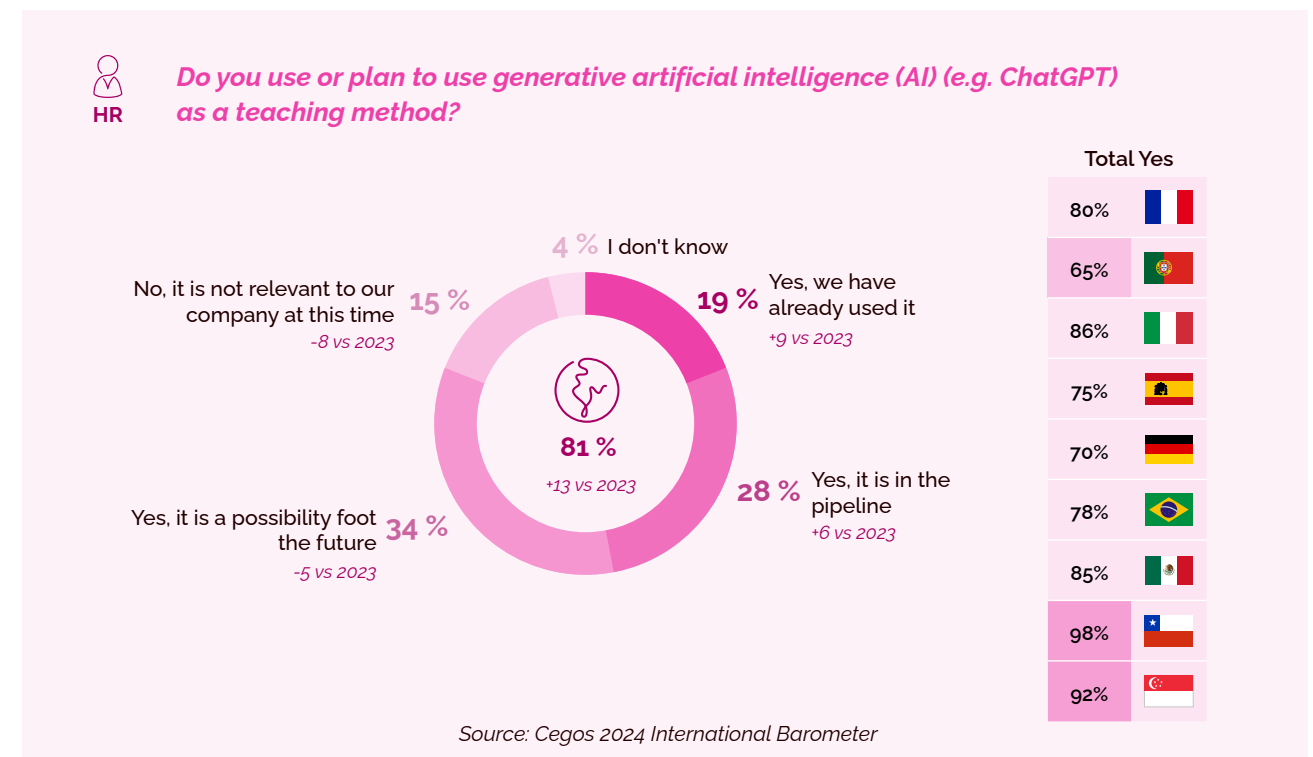
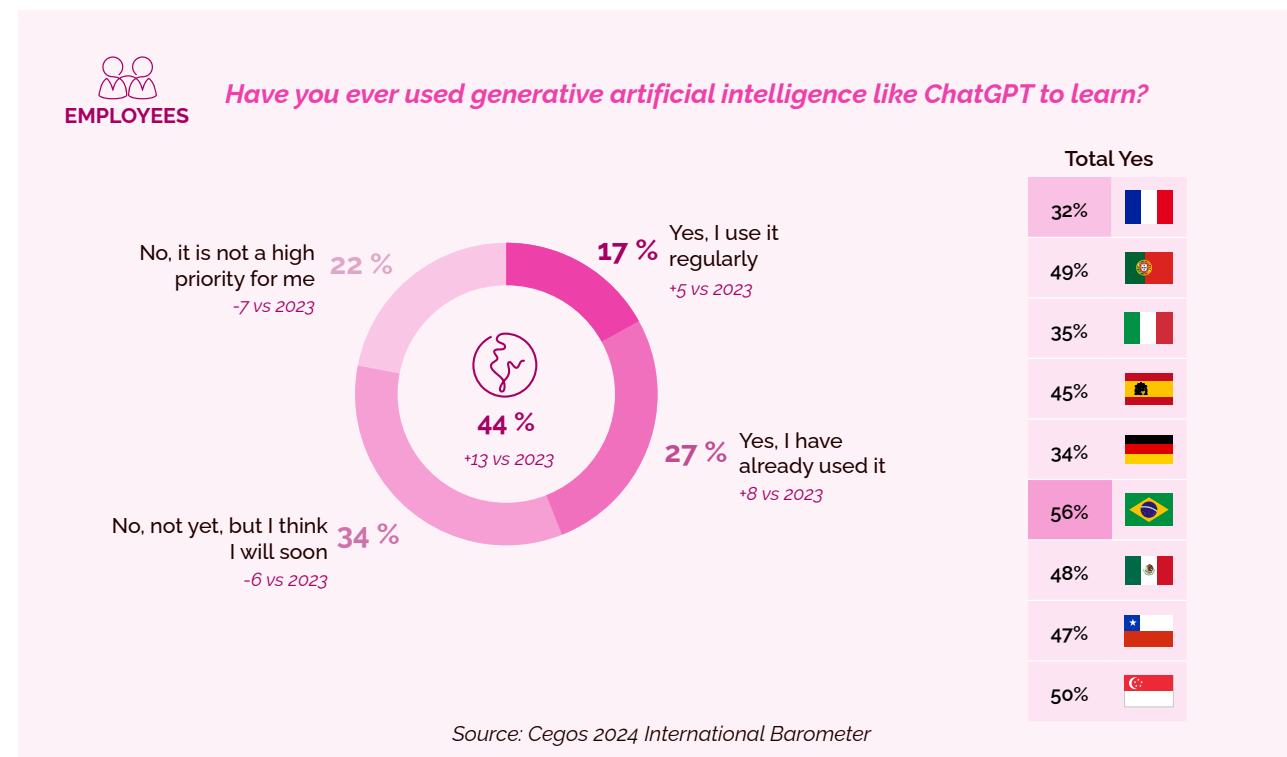
of HR professionals have already used it to individualise training paths.

Generative artificial intelligence is firmly taking its place in the training landscape

44% of employees say they have already used gen AI to learn (+13 points compared to the 2023 edition), particularly executives (57%). While AI has made inroads among Brazilian employees (56%), French employees are still lagging behind in this area (32%).

81% of HR decision-makers say that they have already used or plan to use gen AI as a training method. This is particularly true in the private sector (82% overall) and in companies with between 500 and 1,999 employees (86%). And if Chilean HRDs call for gen AI (98%), Portuguese HRDs remain somehow more reluctant to using it (65%).

In fact, 18% of HR professionals have already used gen AI to individualise training paths.





The use of learning data continues to make headway

Learning analytics (i.e. the exploitation of learning data) aims at understanding the needs and behaviour of learners, to adapt learning paths and thus to encourage trainees' commitment to their training.

This year, **74% of HRDs said they are using training-related data within their organisation:**

- 23% to guide their offer (39% in Italy vs. 10% in Portugal),
- 41% to improve the learning experience (55% in Mexico vs. 35% in Portugal),
- 10% to strengthen the individualisation of courses and even 15% in companies with more than 2,000 employees.

Grégory Gallic, Manager of the “Learning Engineering and Professional Effectiveness” Offering and Expertise at the Cegos Group, explains:

“Agility and usefulness are the two major challenges facing HR and L&D departments when it comes to supporting employees in developing their skills. This means meeting training needs on time, and offering modules and courses that can be easily and immediately transposed into everyday working life.

As the world is being radically transformed by technological developments, training is becoming a genuine support for individual and collective performance.

Innovation in training is becoming an imperative: we need to invest in solutions based on artificial intelligence, in flexible learning platforms, and to adopt fun and interactive training methods, in order to provide a targeted and rapid response to individual needs and to support employees' commitment to their development.

This is all the more important given that employees themselves are determined to train themselves in order to safeguard their employability.”

The Cegos Group Learning Collection

Supporting organizations and training in essential skills, all over the world

The strength of the Cegos group lies on its global experience but also in the diversity and adaptability of its teams and its offers.

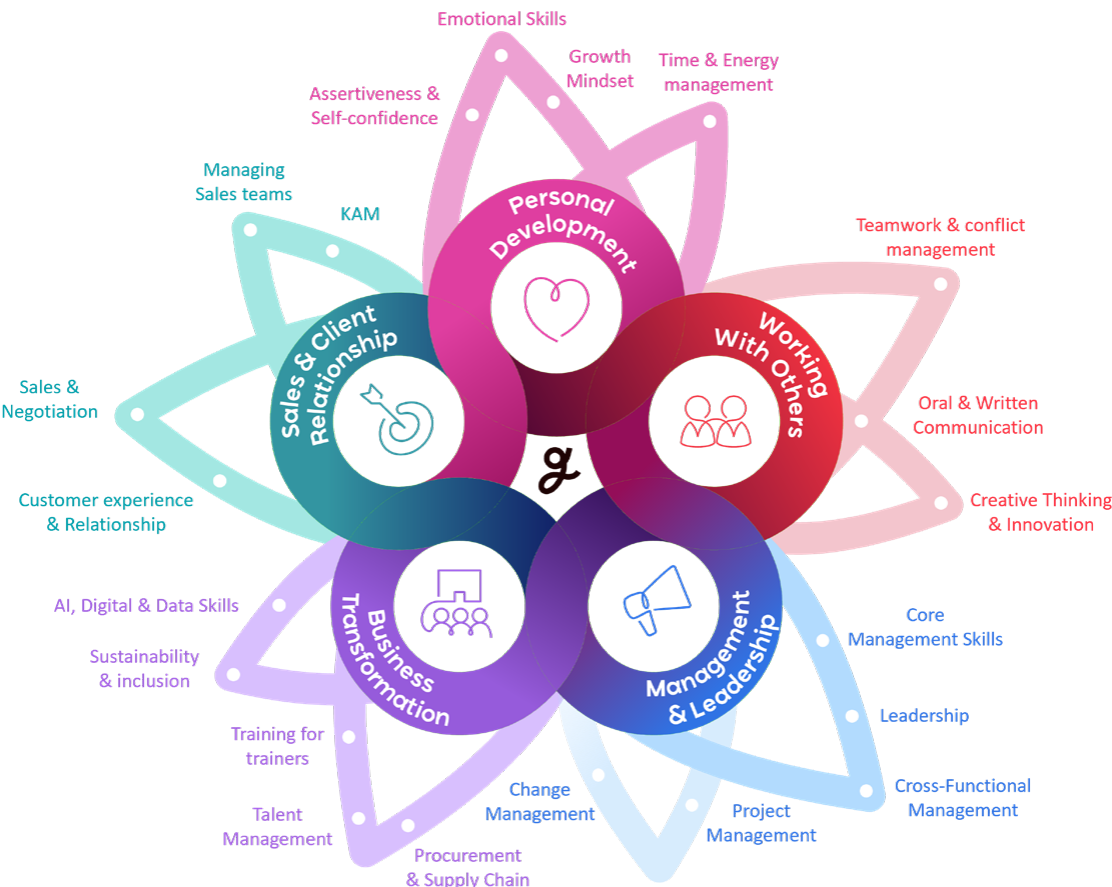
Over the years, we have developed a rich and comprehensive collection of training courses that encompass the essential skills for individuals and organizations around the world.

The Cegos group Learning Collection is thus designed to cover universal skills regardless of the country and sector of activity,

This collection consists of:

- more than 80 ready-to-use training courses, deployable in person or remotely
- more than 3,000 digital resources and e-learning modules
- Available in up to 30 languages, these modules can be assembled to form personalized training courses according to your needs.

The Cegos Group Learning Collection is structured around 20 key skills related to 5 development issues:



The Cegos Group at a glance

A presence in Europe, Asia and Latin America
France, Germany, Italy, Portugal, Spain, Switzerland, United Kingdom, China, Asia-Pacific, Brazil, Chile, Mexico.

Operating in more than
50
countries through a network
of partners and distributors

1,500
employees and
+ 3,000
partner consultants

+ 3,000
digital learning assets
in up to
30
languages

+250,000
people trained
each year worldwide

250 M€
in turnover

20,000
corporate customers

2.5 M
connected learners



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