



Cegos 2023 International Barometer

Transformations, Skills and Learning





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

Cegos has therefore renewed this international barometer once again this year, in order to understand:

- **The priority transformation issues** impacting skills according to HR and Learning & Development professionals,
- **The major emerging disruptions** (such as Artificial Intelligence) and their impact on training,
- Employees' vision of their **employability** and their concerns in terms of skills development,
- **The fields and modalities of training expected** by organisations and employees in the future.

The 2023 survey was carried out in June and July 2023 in **9 countries in Europe** (France, Germany, Italy, Portugal, Spain), **Asia** (Singapore) and **Latin America** (Brazil, Mexico, Chile). This edition polled **5,048 employees** and **488 Directors or Heads of Human Resources / Directors or Heads of Training**, all working in private and public sector organisations with 50 employees or more.



Organisations and their HR and Learning & Development departments are facing many and similar challenges in all countries: hybrid working, changes in management culture, talent attraction and retention, ecological transition, digital transformation and impact of artificial intelligence, social responsibility....

While employees are genuinely concerned about the impact of these changes on their jobs, they are also highly motivated to learn and train.

For their part, HR departments say they are ready to support skills development and adapt their training strategy to offer more individualised and on-the-job learning experiences.

At Cegos, we are obviously convinced that training is an optimal response to these complex challenges, which are decisive for both organisations and society.

Training is not only a key driver for competitiveness. On an individual level, it is also a wonderful tool for professional integration and social inclusion, enabling each one to find his or her rightful place in the emerging world of work and society.

Benoit Felix,
Chairman of the Cegos Group



Key figures

Employees and HR focus on skills development to meet the major challenges of organisational transformation

- HRDs identify artificial **intelligence and data**, but also **new ways of working**, as the main transformation challenges.
- **74% of international employees** think current transformation challenges (technological, environmental, societal...) **will change the content of their work**, and **30% even fear seeing their job disappear**.
- According to HR, **18% of jobs** in their organisation are at **risk of skills obsolescence** in the next three years.
- To cope with these transformations, 57% of HR managers intend to **support their employees in upgrading their skills**, particularly their **digital skills**, and **to recruit** new profiles (56%).
- **Only 8% of international HR managers** identify the **ecological transition** as a **key issue** for supporting and developing skills within their organisation.
- 59% of employees would agree **to finance** part of their training costs.
- 85% of international employees say they would consider a complete career change if it were more meaningful.

Tailored to individuals, on-the-job, just-in-time: today and tomorrow's training challenges

- 41% of international HR staff find it **difficult to match their training offer with their organisation's skills needs** (-14 points vs. 2022).
- 44% of employees state **the response to their training needs often comes late**.
- Employees expect above all **on-the-job** (51%) and **interactive/playful training** (41%).
- HR staff would like to offer **more personalised training paths** (47%), **with more varied methods** (41%). In fact, 74% of them plan to **use artificial intelligence to individualise courses**.
- For HR managers, tomorrow's training courses will combine **adaptive learning** (46%), **e-coaching** (45%) and **social learning** (41%).
- **Artificial intelligence is on the slow rise**: only 10% of HR managers have already used it as a learning resource.
- 25% of HR departments **are still not using training data**.



Employees and HR focus on skills development to meet the major challenges of organisational transformation

Transformations are a source of concern for employees

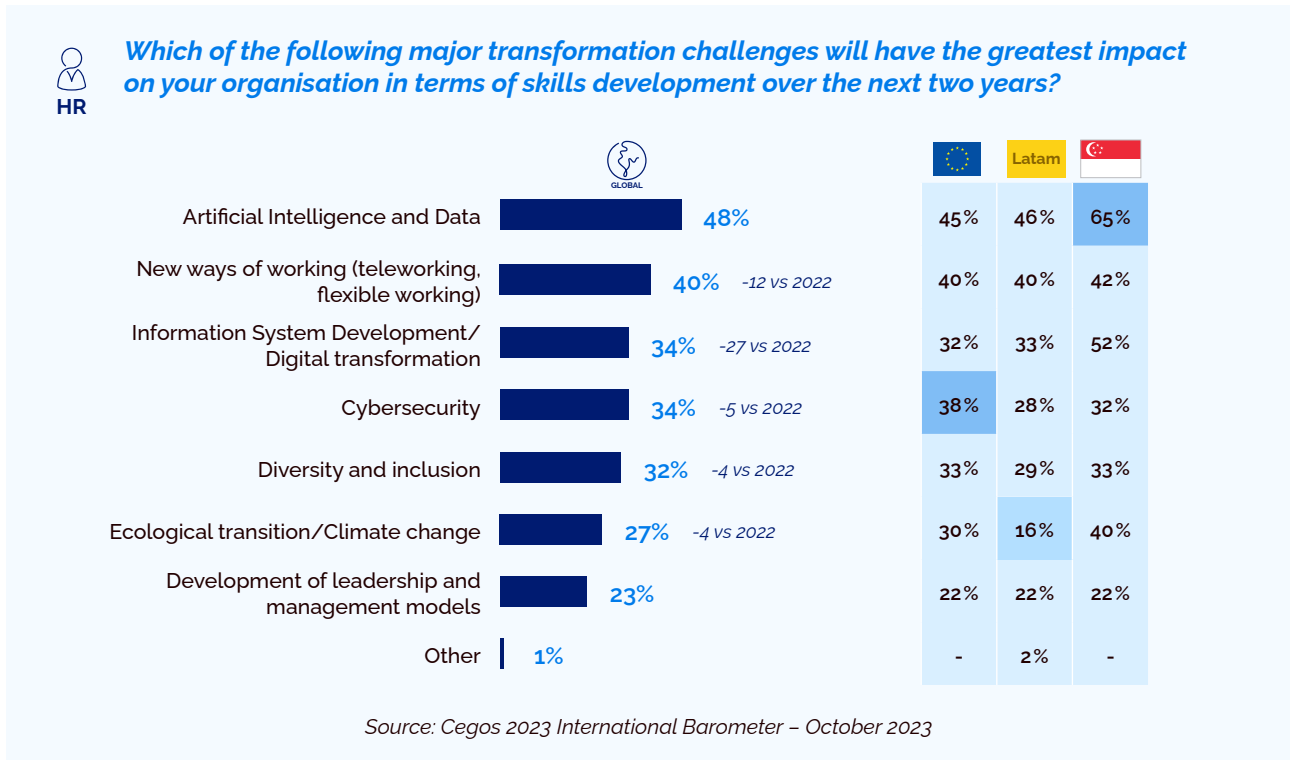
All organisations, everywhere in the world, are faced with numerous and complex transformations. Whenever technological or societal, they are always perceived by HR managers as having a major impact on employee skills development.

International HR managers quote **artificial intelligence and data** first and foremost (48%), particularly in companies with 500 to 1,999 employees (55%) and over 2,000 employees (51%). This rate rises up to 65% among Singaporean HR

vs only 33% in France. They then mention **new ways of working**, at 40% - down 12 points on 2022.

It is worth pointing out that French HR managers stand out from their counterparts by placing **cybersecurity** (40%) and the **ecological transition** (38% vs. 27% internationally) at the heart of skills transformation challenges.

As a consequence of technological acceleration, notably with the rise in power of AI and data management, the vast majority of surveyed employees (74%, +7 pts vs 2022) are aware that these challenges will change the content of their work, especially managers (79%). And **30% of international employees even fear that their job will disappear (+7 pts vs 2022)**. This fear is greatest in Singapore (43%) and Brazil (39%) and among workers (39%).



30%

of international employees fear seeing their job disappear

74%

think current transformation challenges will change the content of their work

4 out of 10 employees admit to feeling overwhelmed by technology: a trend that is rising sharply internationally (+8 points vs. 2022). This feeling is very prevalent among employees in Latin America (47%) and Singapore (52%), but less so in Europe (29%).

HR managers do not have the same view of these challenges, since they believe that **only 18% of jobs in their organisation present a risk of skills obsolescence** in the next three years. This optimism could be the result of the Covid crisis that has often demonstrated the resilience of organisations.



Skills development is a key response to transformation challenges

To cope with the impact of the transformations underway on their organisation's business lines and skills, **international HR managers plan to support employees in upgrading their skills in their current positions (57% internationally, and 62% in France, 67% in Germany, 88% in Singapore vs 38% in Italy).** They also **intend to recruit new profiles (56%),** particularly in companies with over 2,000 employees (63%).

Another interesting point is that **strengthening digital skills is imperative for 42% of international HR respondents, particularly in Europe (44%) – less in Singapore (30%).** This is followed by soft skills (38%). The development of management skills now seems less expected internationally (35%, down 4 points vs. 2022). Strengthening business skills comes last (29%).

When asked about the key skills for which they see a strong need for support and skills development, HR's top three skills are digital literacy, management, and innovation. Surprisingly, **the ecological transition does not feature among the priorities of international HR, ranking ninth in the list of issues identified for the coming years:** this result no doubt reflects their difficulties in grasping these upheavals and integrating them into their L&D strategy.

More specifically, regarding soft skills, **their development remains important for both HR and employees. The former mention above all agility and adaptability (53%)** to cope with the many changes in business sectors, organisations, and professions. **International employees, for their part, would like to be more efficient in the organisation of their work (39%),** to evolve more effectively in a hybrid environment and preserve the balance between their personal and professional lives.



A more active role for employees in developing their skills

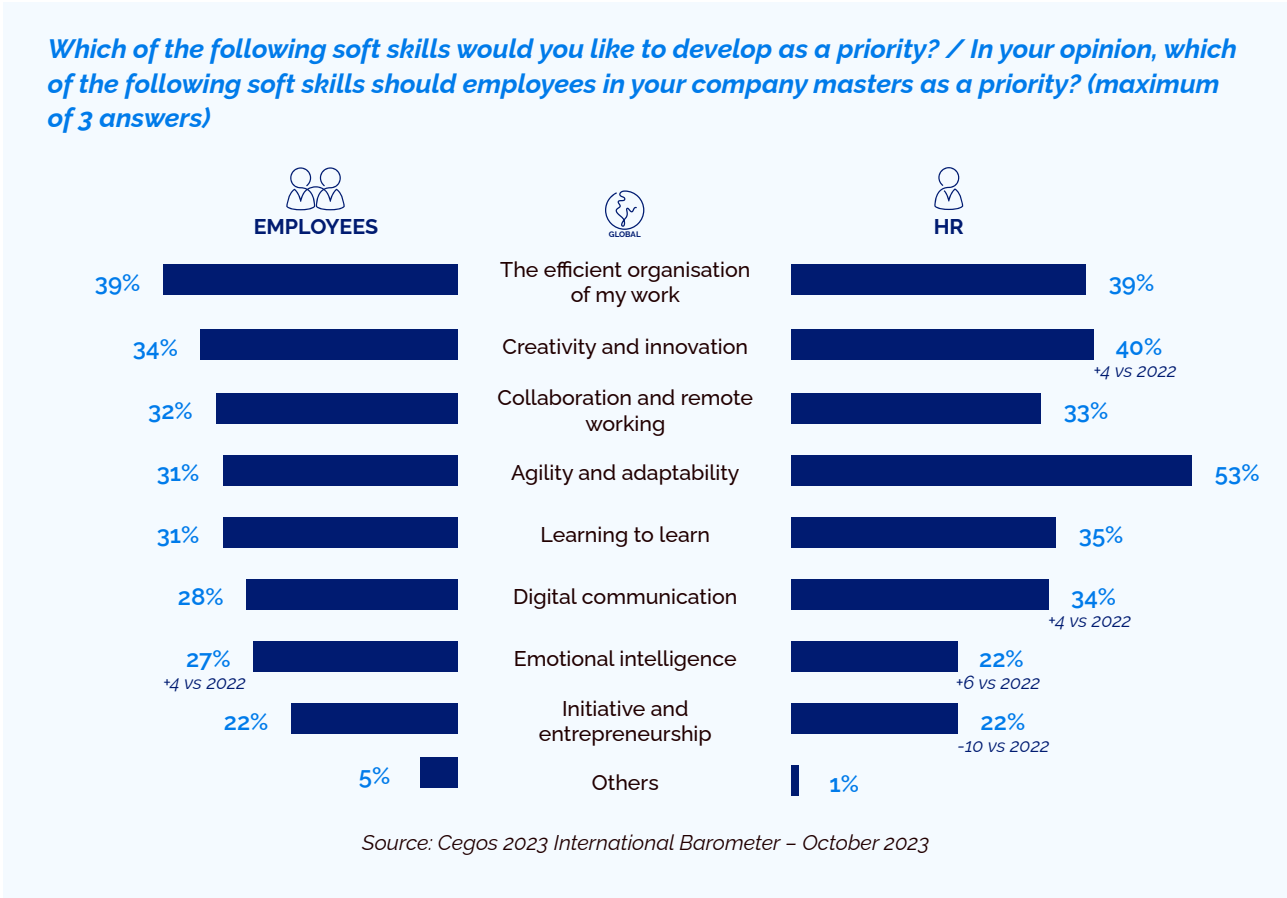
International employees (62%) and HR managers (63%) agree that skills development remains a process shared equally between the organisation and the employee. In fact, this conviction has been gaining ground among HR managers over the past two years (+4 points vs. 2022, +18 vs. 2021).

Compared to their international colleagues, **Chilean (73%) and Portuguese (71%) employees are even more convinced,** while French and German employees are much more reluctant to the partnership dimension of skills development (55% and 46%).

60%

of employees are willing to finance part of the training costs themselves

However, the good news is that international employees are determined to play an active role in developing their skills by investing in their own training: 59% say they are prepared to finance part of the associated costs themselves, while 76% would be willing to take part in training outside their working hours. Latin American employees are the most motivated to self-finance part of their training costs (78%) and to allocate extra-professional time to training (88%).



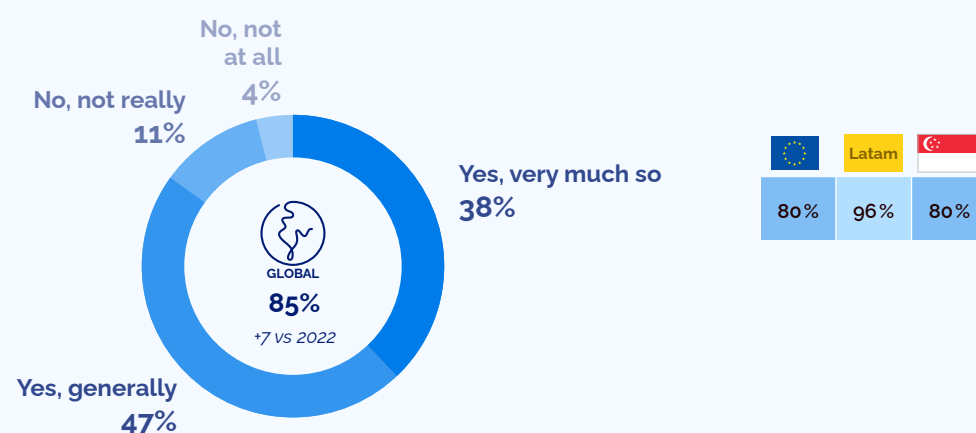
The quest for meaning at work: a driving force behind retraining

We have all seen it in our organisations and in our personal lives: since the Covid crisis, the quest for meaning at work has taken center stage in collective debates and individual thoughts. **This year, 85% of international employees (+7 points vs. 2022) are now ready to consider a complete career change if it were to bring greater meaning**, particularly in Brazil (97%), Chili (94%) and Mexico (96%). French (69%) and German employees (66%) seem less inclined to take the plunge.



EMPLOYEES

In recent years, we have seen a growing number of employees looking for a greater sense of purpose in their work life. Would you be willing to consider a complete career change if it were more meaningful?



Source: Cegos 2023 International Barometer – October 2023

To respond to this quest for meaning and retraining, 82% of international HR managers are taking action:

- 13% say they have already deployed career transition programs;
- 37% (+9 vs 2022) are planning to do so;
- 32% (+4 vs. 2022) believe that this is a possibility for the future.

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

"It is no surprise that the emergence of generative artificial intelligence is quoted as the leading transformation driver impacting skills. In the short term, this means that Learning & Development players will have to mobilise strongly to offer training solutions on three levels:

- raising employee awareness on a massive scale to demystify this topic,
- developing the technical skills needed to perform AI-related jobs,
- and applying AI to business lines through clearly identified use cases.

The second highlight of this year's survey is the ecological transition. Except for French HR professionals, who have made this a priority issue, international HR professionals do not see this as a major challenge for the development of their teams' skills over the next two years. Although they face the urgency of the ecological transition, HR does not yet seem to have fully grasped this highly sensitive topic, therefore exposing organisations to possible disqualification by their market, their customers, and their talents. The increasing regulations will surely accelerate skills development on these subjects."

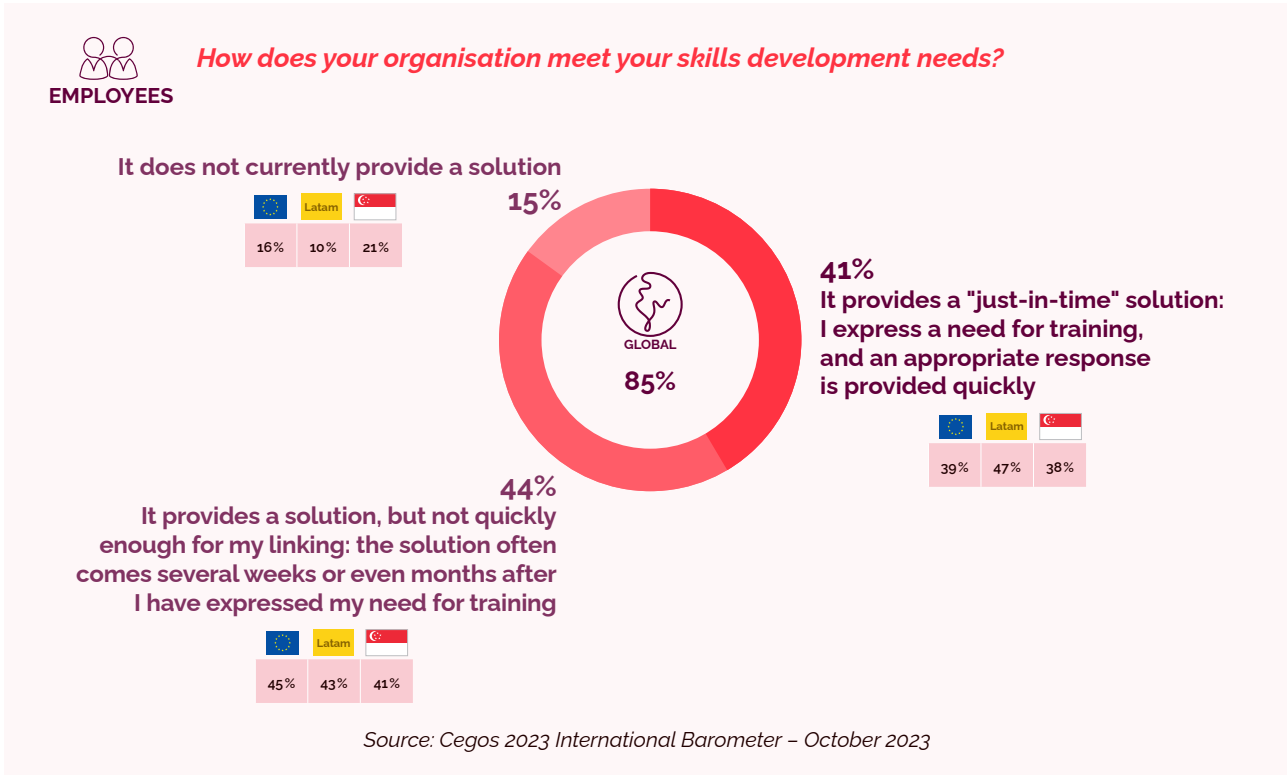
Tailored to individuals, on-the-job, just-in-time: today and tomorrow's training challenges

"Just-in-time" training remains a challenge

For the past two years, international HR professionals have expressed growing difficulty in matching their organisation's skills needs with its training offer. While 55% of them pointed out this difficulty last year, the trend seems to be reversing this year. However, **41% of them admit that this remains a tricky task, particularly in the public sector and in medium-sized companies.** Italian (52%), Portuguese (46%) and German (45%) HRDs seem to be in greater difficulty than their counterparts in other countries.

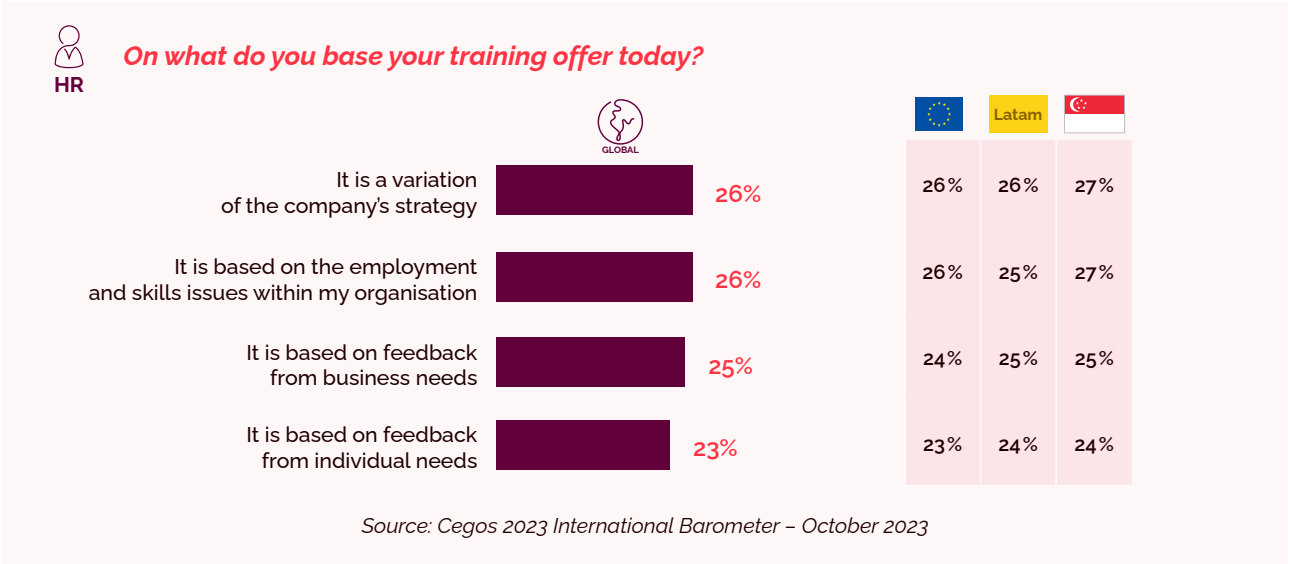
85% of employees declare their organisation meets their skills development needs.

41% of them feel that their organisation meets their needs "just in time", while **44% of them say that the answers they receive often come too late**, several weeks or even months after they have shared their expectations. While technological rapid evolution and constant change are becoming the norm, "just-in-time" training means encouraging employees to commit proactively in the development of their skills. In particular, this means gathering their needs more frequently and empowering them in terms of skills development.



Building the training offer is based as much on the organisation's strategic and skills challenges as on business and individual needs

The training offer must address a broad spectrum of needs: HR departments must take into account their organization's strategy, its employment and skills challenges, the individual needs identified, and the needs identified by the business lines.



These criteria are considered in a balanced way, combining the medium-long term and the short term: HR thus seeks to address both the required strategic alignment and the individual and operational needs expressed by the teams.





Individualization and role-playing remain at the heart of training issues

To the question "What changes should be made to the training courses provided by your company in order to better develop your / employees' skills?", employees and HR have different answers:

Bring training closer to their day-to-day work: this is the primary expectation of international employees, particularly in Mexico (60%), Chile (57%) and Spain (56%), **as they above all want training that is operational**, more useful and directly transposable to the work situation (51%, +18 points vs. 2022). This expectation is less important among technicians (39%) and workers (39%).

Employees also imagine more interactive and playful systems (41%, +10 points vs. 2022).

On the HR side, priority is given to individualizing training (47% on the international level) to strengthen employee commitment and adapt to individual needs, particularly in large companies with over 2,000 employees (52%). This trend, which has risen sharply since last year (+14 points), is even more prevalent in **Germany (53%), France (57%) and Singapore (70%)**.

This is an emerging trend: artificial intelligence is a driver for individualizing training paths as **63% of international HR professionals are considering using it to meet this challenge**. This ratio rises up to 93% in Singapore. **However, only 11% of them have already used artificial intelligence**, particularly in companies with 500 to 1,999 employees. While HR in Chile (17%) and Singapore (22%) claim to be further ahead in the use of AI, Brazilian HR decision-makers (5%) seem to be lagging behind.

60%

of HR plan to use AI to individualise training paths

There are two reasons for this ratio: the lack of learning data on the entire skills development value chain; and its use focused solely on asynchronous digital solutions, which are less popular with employees and represent only a fraction of skills development initiatives.

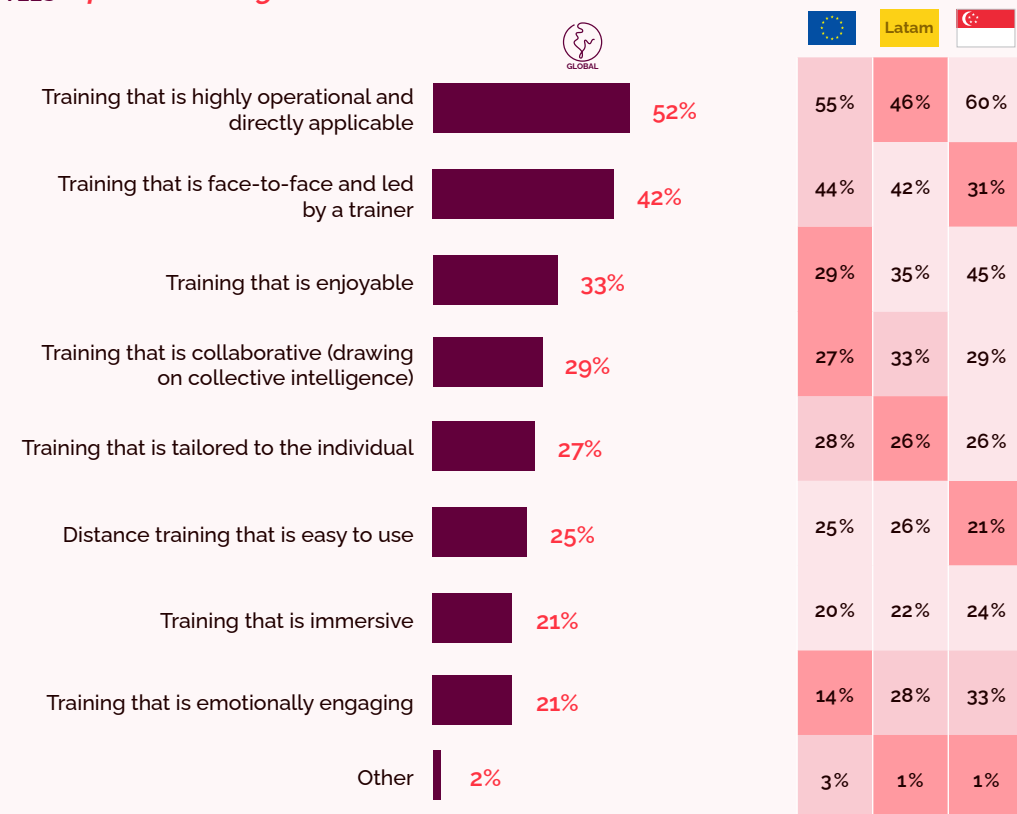
Anchoring training in real-work situations is a strong expectation and a driver for employee commitment

According to international employees, the three main qualities of a training course are:

- **its on-the-job usefulness** (52%), especially in Singapore (60%), confirming employees' desire to bring training closer to their day-to-day work;
- **its face-to-face dimension** (42%), particularly in France, where attachment to instructor-led sessions remains strong (56%). This is confirmed by the fact that Cegos has reduced the number of distance learning sessions, in the wake of the Covid health crisis;
- **its fun aspect** (33%).



Based on your experience, what are the three main qualities you expect from a training course?



Source: Cegos 2023 International Barometer – October 2023

Moreover, employees and HR decision-makers share the same point of view globally, but with significant differences between countries – **employees are more likely to commit to training:**

- **If it is anchored in a real-life work situation (65% of international employees** - 74% in Brazil and Portugal vs 50% in France - **and 68% of HR managers worldwide** - 83% in Brazil and Portugal vs 59% in Chile), illustrating the employee's desire for knowledge that can be directly transposed to his or her day-to-day professional life;

- **If its content is easy to access (for 58% of employees** - 65% in Spain, 64% in Brazil and Germany vs 54% in France - **and 55% of HR** - 73% in Brazil and Germany vs 46% in Portugal), reflecting the need for a clear, visible, and attractive offer (making offer marketing a new key skill for the training function).
- **If accompanied by a tutor or trainer (for 47% of employees** - 58% in Mexico, 55% in France vs 29% in Singapore - **and 48% of HR** - 60% in France and Italy vs 36% in Chile).

Tomorrow's training methods will combine personalization and social interaction

While international HR players are keen to offer a greater variety of teaching methods, their top 3 are adaptive learning (46% internationally, 67% in Spain vs only 8% in Germany), e-coaching (45% internationally, 58% in Portugal vs 38% in France) and social learning (41% internationally, 52% in Mexico vs 33% in France and Portugal).

These methods confirm their desire to tailor learning paths to individuals and support employees in a more personalised way, by being closer to their work situations.

Artificial intelligence is on a slow rise to support these teaching methods, and their use is not yet firmly rooted in the everyday working lives of the surveyed people. Only 12% of employees (10% in Europe vs 23% in Singapore) say they use it regularly. 10% of international HRDs have already used it as a teaching method (5% in Italy, 20% in Singapore) while 23% of them (up to 38% in Chile) say it is not yet relevant to their company so far. This reluctance may raise questions about competitiveness. It is worth underlining that Singapore HR staff is more aware of the relevance of using AI (only 3% keep on being reluctant).



Have you ever used generative artificial intelligence like ChatGPT to learn?

	GLOBAL	EUROPE	Latam	ASIA
Yes, I use it regularly	12%	10%	11%	23%
Yes, I have already used it	19%	16%	27%	17%
No, not yet, but I think I will	40%	36%	46%	39%
No, it is not a high priority for me	24%	38%	16%	21%



Do you use or plan to use generative artificial intelligence (AI) (e.g. ChatGPT) as a teaching method?

	GLOBAL	EUROPE	Latam	ASIA
Yes, we have already used it	10%	9%	9%	20%
Yes, it is in the pipeline	22%	17%	25%	38%
Yes, it is a possibility for the future	39%	40%	39%	35%
No, it is not relevant to our company at this time	23%	28%	22%	3%
I don't know	5%	6%	5%	3%

Source: Cegos 2023 International Barometer – October 2023

Measuring the impact of training is gradually becoming part of everyday practice

The digitization of practices raises the necessary question of learning data (learning analytics) and how it can be used to better understand users' behaviours and needs, tailor learning paths to individuals and facilitate contact.

Today, 75% of HR departments worldwide say they use training-related data:

- 19% to manage their offer;
- 41% to improve the learning experience;
- 15% to strengthen the individualization of training paths which remains rather low in view of HR's declared intentions in this area.

Grégory Gallic, Manager of the "Learning Engineering and Professional Effectiveness" Offering and Expertise at the Cegos Group, adds:

"The survey underscores employees' twofold demand: on the one hand, they want to have access to training that meets their skills development needs 'just-in-time' so that they can adapt to ongoing changes in their environment.

On the other hand, they emphasise the need for training to be anchored in their real working lives so that it is ready to use. This is a major challenge for HR and L&D departments, who also have to deal with their top management's guidelines.

That said, it is imperative to address it, both to engage employees in their training path as well as to enrich their company's skills capital. In today's context of in-depth change, skills development is as much a question of competitiveness as it is of attracting and retaining talents."

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.

State-of-the-art training in many areas:

- Management & Leadership
- Sales & Customer Relationship
- Professional & Personal Efficiency
- Project Management
- Information Technology
- Marketing & Communication
- Sustainable Development & CSR...
- Finance
- Purchasing
- Human Resources
- Train the Trainer...

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

1,400
employees and
+ 3,000
partner consultants

+ 3,000
digital learning assets
in more than
20
languages

+250,000
people trained
each year worldwide

236 M€
in turnover

20,000
corporate customers

2.5 M
connected learners

Just like its environment,
your organisation is always on
the move, turning more digital,
more cross-functional, more
open.... The rapid adaptation
of your teams is becoming
a key competitive factor since
skills are an increasingly
strategic intangible asset.

Whatever your skills
challenge, the Cegos teams
are here to help.



Professionalise your teams to boost collective performance

We support
the development
of your organisation's
businesses, from
mastering fundamental
skills to accompanying
teams in their professional
evolution.



Support skills impacted by transformations

Whether business,
behavioural, managerial,
digital, L&D, CSR or tools...



Implement your international training projects

Cegos teams are at your
side anywhere in the world,
to roll out your projects,
create an international
catalogue or provide direct
support to L&D teams...



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