



The global learning race

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The battle to become learning organisations

Organisations all around the world are increasingly aware that if they want to remain competitive, they need to invest in upskilling their people.

But with the skills and behaviours critical to business success changing constantly, and the tools and capabilities used to train people evolving just as quickly, all organisations face ongoing challenges to find and deliver opportunities for upskilling.

Robust and effective methods for learning are essential for the development and maintenance of skills, as is the identification of the learning required in the first place. For this third phase of Learning Insights, we want to take a step back and consider the different approaches that organisations around the world are taking to preparing their workforces for the future and the pressures that they are facing.

The extent to which employers are keeping up with the pace of change in skills needs can be assessed in different ways: financial results, employee retention, business performance – and more.

By considering multiple factors, it is possible to get a picture of the health of an organisation as a whole. Bearing in mind the role they play in the society and economies in which they operate, looking at multiple organisations should give us a clear indication of those countries and regions that will be the major players in the future.

“Work is changing every day and so you have to provide employees with development to meet those changes – employers are realising that to cope with the workplace of the future they need to be flexible and new skills are required. The organisation is becoming the place to learn now and so they need to provide learning experiences on the job – you can’t wait now”

Dr Kim Schofield
General Manager, HR Standards and Practice, Australian HR Institute

How we did it

As part of our Learning Insights research, we contacted over 6,500 employees and more than 1,300 employers globally. From this, we pulled out two key metrics that will help us understand the health of learning within businesses.

In this short report, we share analysis which compares the results from the 13 countries we surveyed, to create a picture of where we are seeing the highest levels of attention being given to learning and therefore which countries are likely to see the greatest level of advancement in the skills of their people in the coming years.

- 1. Intention** to invest in learning
- 2. Alignment** between employer and employee perceptions of the value learning adds to the workplace

Intention helps demonstrate whether learning is seen as a business priority, and alignment reveals whether work-based learning opportunities are tackling the key challenges faced at both a business and an individual level.



You can find full details of the research methodology in the first release of Learning Insights 2019:

MICRO-PERSONAL-NETWORKING

A global learning challenge

79% of employees globally say they want a greater focus on L&D, and just 16% say that the learning they received in the last year was very effective.



Barriers to effectiveness – the employer view

Funds and budget?

In Australia, the UK and Sweden, employers are most likely to say that they don't have access to enough funds and budget



Resource (personnel)

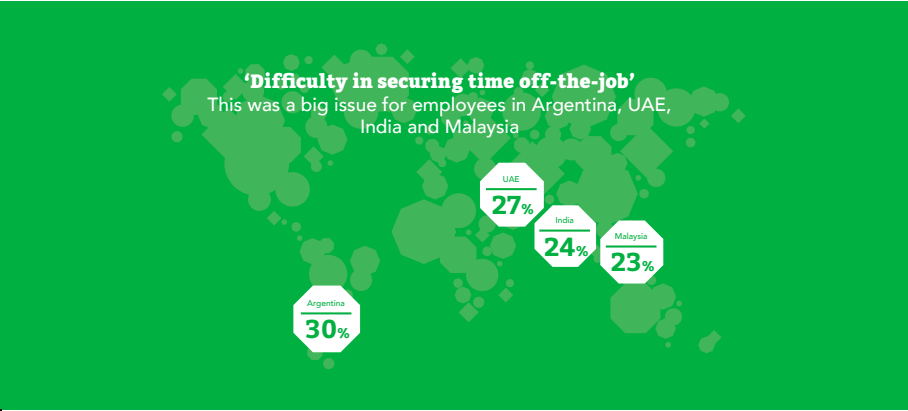
USA and Australian employers are most likely to say that they don't have access to enough resource (personnel)



A lack of strategy or clear and agreed priorities

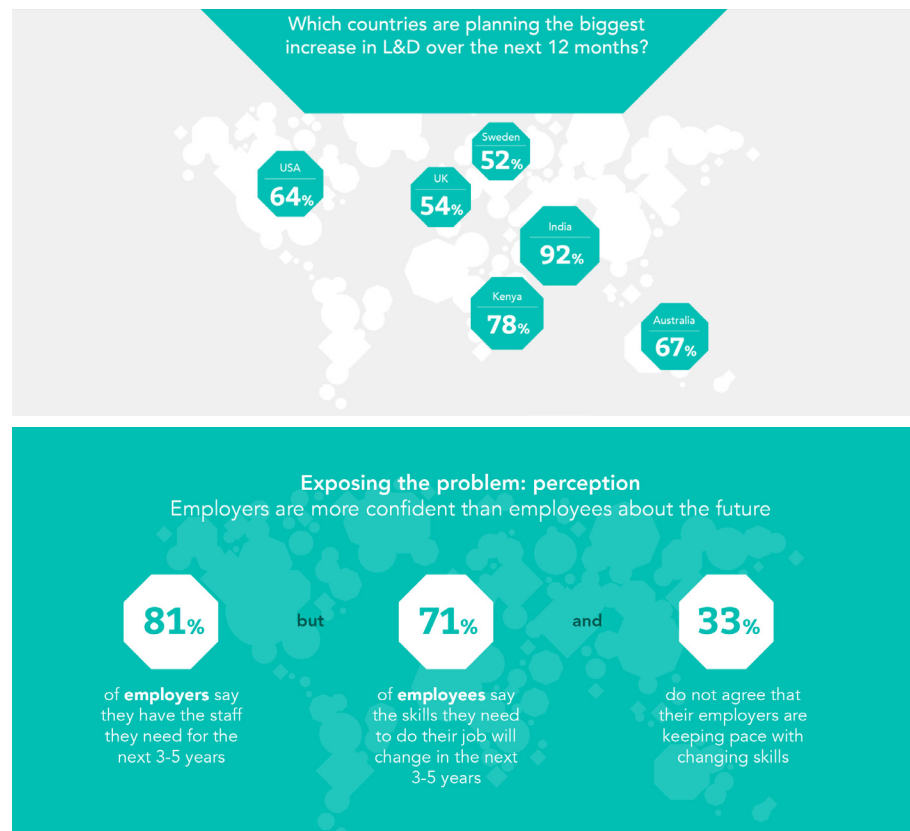
UK and Sweden were most likely to say no, they did not have enough access to strategy





They're investing – but not enough

The good news is that 68% of employers anticipate a greater spend on L&D in the future – but not at a level that meets the need.



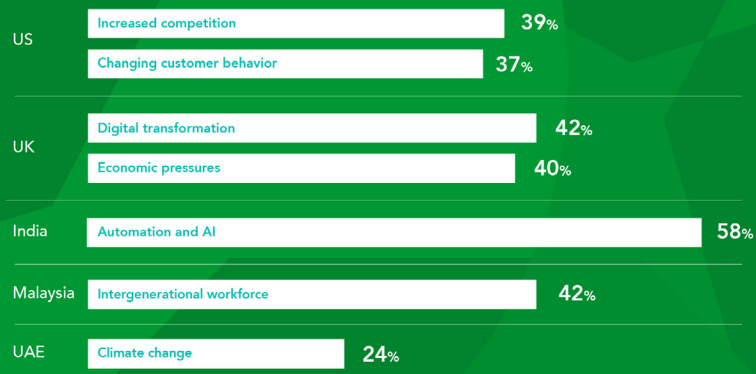
There are global differences in the confidence employees have that their organisation has taken steps to improve their skillset and employability.



Market forces impacting L&D plans

- Employers in the USA say increased competition and changing customer behavior/expectations are the top two factors affecting their industry
- In the UK, digital transformation and economic pressures are causing the biggest waves in the business landscape
- Employers in India consider automation and AI to be significant drivers of change
- Businesses in Malaysia considered the growing intergenerational workforce as a key contributor to change
- Organisations in the UAE were most likely to think climate change a driving force behind change

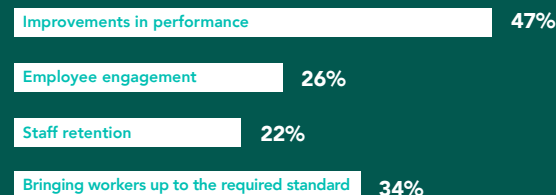
Market forces motivating employers to confront their learning challenges



Training with impact

Globally, we found consistent benefits of effective L&D provision across organisations.

Reasons for providing L&D opportunities to the workforce



This is mirrored by employees, with 60% globally saying that the training currently provided by their organisation has a positive impact on their desire to stay with their employer. This is especially true of employees in:



Getting to the crux of the problem

Employees around the world recognise the skills they need for the future are changing – and employers globally understand the market forces driving them.

Broadly speaking, employers are confident that they have the strategies and funding available to future-proof their workforce in light of the external pressures in their markets. However, only two thirds of the global workforce are confident that their employer is keeping pace with these changes, revealing a worrying perception gap.

In some countries, although not all, this difference in insight is potentially leading to under-investment in L&D and a lack of prioritisation.

“Technology keeps changing so it is hard to predict what skills will be needed in the future. This will be the rise of L&D as traditionally it has taken a more collateral-based approach in the past whereas now it needs to be much more connected to workforce planning for the future, partnering with HR and the business to understand where the business is going and predicting the skills that will be needed. They will need to look at not just bringing in new talent but also how they upskill people in the workplace”

Dr Kim Schofield
General Manager, HR Standards and Practice, Australian HR Institute

Factors driving change

If the key factors driving the biggest changes in the industry (for employers) were the same as the factors 'that most affected the changing skills needed for employees to do their jobs, it would be easier to take actions and tackle those challenges.

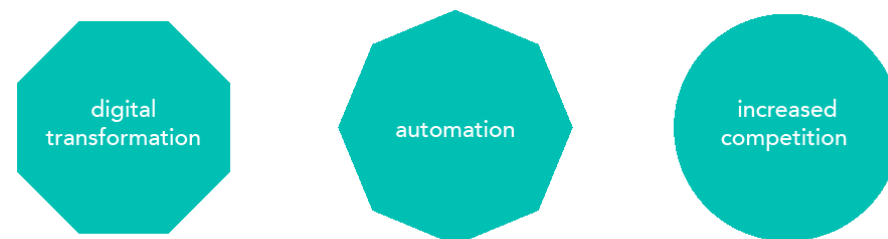
Markets where both employers' and employees' views are more aligned (i.e. top 3 factors in common)

In Argentina, Malaysia and UAE, although the order they ranked them in may have differed, both employers and employees chose the same top three factors which were driving the biggest changes in the business and affecting the skills individuals needed to do their roles.

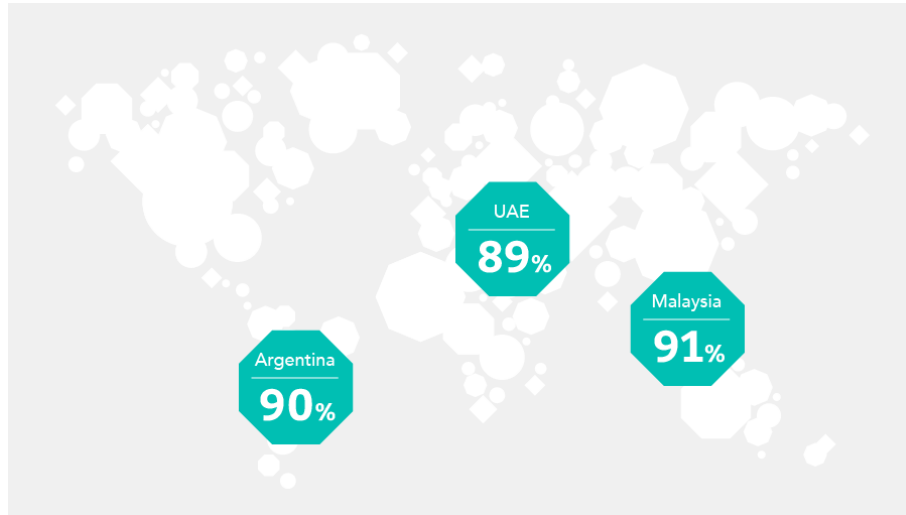
Argentina



Malaysia and UAE



This is reflected in the fact that employees are among the most satisfied that their skills are being kept up-to-date:



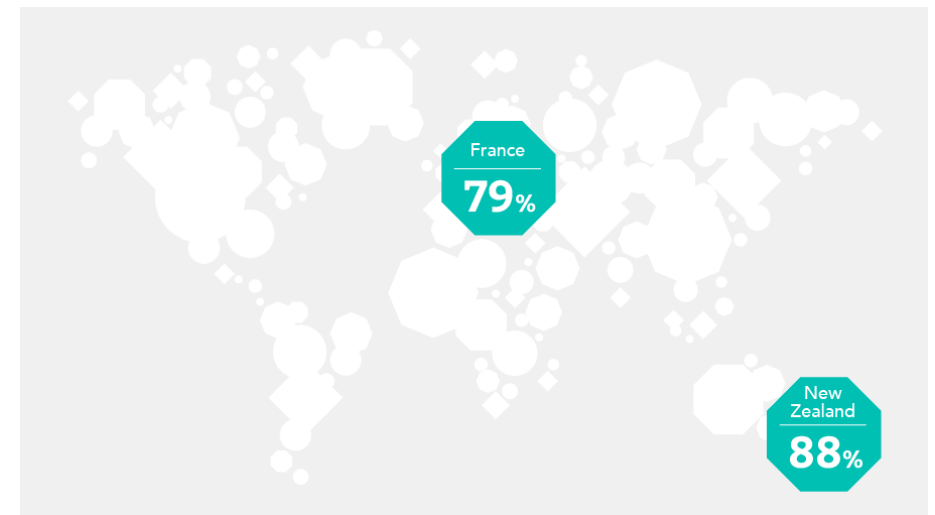
Markets where both employers' and employees' views are **less aligned** (i.e. only 1 factor in common out of the top 3)

In the case of France and New Zealand, employers and employees only agree on one of the top three factors driving changes. It is the same thing for both countries – digital transformation.



Beyond that there is no commonality at all with employees focused more on factors that immediately impact their jobs such as automation and changing customers behaviour/expectations whereas employers see factors like increased competition driving change.

Unsurprisingly, employees in these countries were slightly less convinced that their employers were keeping their skills up-to-date



The types of training on offer

Markets where both employers' and employees' views are **more aligned** (top 3 trainings in common)

In the USA market, the most popular training method by far that employees would like to receive in the future is on-the-job training (44%). Fortunately, this is already top of the list for employers too (39%). The rest of the top three is similarly aligned, with employees wanting and employers intending to offer coaching by senior leaders/managers/peers and online learning.



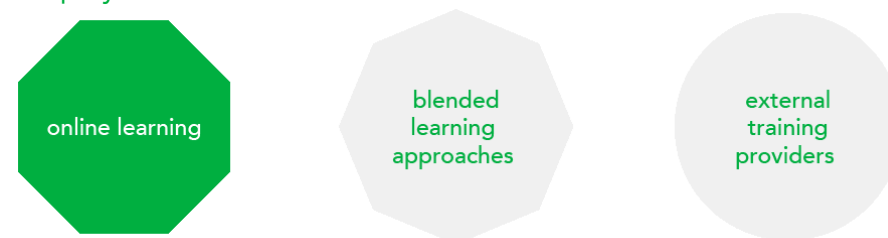
Markets where both employers' and employees' views are **less aligned** (only 1 training in common out of the top 3)

In India both employees (37%) and employers (43%) agreed on the most popular training method – online/e-learning courses. However, beyond that priorities diverge with employees wanting on-the-job training (30%) and external conferences/events (28%) and employers planning to offer blended learning approaches (34%) and external training providers (32%).

Employees in India:



Employers in India:



Top of the list in South Korea for employees was coaching by external experts (33%), with external training providers (23%) and external conferences or events (21%) the next most popular training methods. However, although coaching by external experts is in the top three options employers are planning for the next 12 months, they are more likely to offer on-the-job training (36%) and online/e-learning courses (31%), which is a disconnect from employee expectations.

Employees in South Korea:



Employers in South Korea:



Using technology and content to increase employees' participation in L&D

Using the technology and content that employees want to engage with will increase their participation in L&D. Equally, seeing their employers take the initiative to do so could make them feel more valued, which will in turn have an impact on their productivity.

Markets where both employers' and employees' views are **more aligned** (top 3 factors in common)

In Kenya, employers are offering the type of L&D activities that employees are saying they want – e-learning/online courses (employees: 32%, employers: 57%), insight from external experts (employees: 30%, employers: 46%) and personalised learning programmes (employees: 30%, employers: 34%).



This strong alignment is reflected in the fact that employees in Kenya have the second highest score (77%) of all the countries we surveyed for satisfaction with the effectiveness of the learning that they have received over the last 12 months.

Markets where both employers' and employees' views are **less aligned** (only 1 factor in common out of the top 3)

South Korea had the lowest global rating for employee satisfaction in learning effectiveness (44%) and Sweden the second lowest at 48%. Both countries each have only one technology/method in the top threes of both employers and employees – personalised learning programmes in the case of South Korea and elearning/online courses in Sweden.

Employees in South Korea:



Employees in Sweden:



Access problems and barriers to upskilling staff

Employers need to take a long hard look at their L&D provision and how employees take it up. If the main barriers to upskilling are the same as the problems faced by employees when accessing training and development activities, they should be easy to tackle and improve. But, if this isn't the case, employers will need to acknowledge the real problems faced by employees if they want to maximise training uptake and upskilling. Doing so will have a positive impact on their employees' productivity.

Markets where both employers' and employees' views are **more aligned** (top 3 barriers in common)

The situation in Kenya looks easily resolvable – the three main barriers to upskilling staff are in line with employees' views on the main problems they face when accessing training and L&D activities. These are a lack of resources (employees: 35%, employers: 53%), lack of time to attend training (for employees: 24%)/to develop activity (employers: 28%) and difficulty in securing time off-the-job (employees: 19%, employers: 28%). It is worth pointing out that employers in Kenya also believe that the changing workforce is one of the main barriers to upskilling staff in their organisations (31%).

lack of
resources

lack of time to
attend training

difficulty in
securing time
off-the-job



Markets where both employers' and employees' views are **less aligned** (only 1 out of the top 3 barriers in common)

There are some common barriers to training across all countries – a lack of time was often cited in terms of attending training for employees and developing activities for employers. In the case of South Africa and Sweden this was indeed the main reason given by each country, with 28% and 21% of employees respectively and 24% and 27% of employers stating this.

Beyond that, the barriers diverge in these two countries. In South Africa employers also struggle with securing time off-the-job (24%) and accessing content/delivery systems or platforms (24%), whereas employees face a lack of resources (20%) and interest in training or people development provision (19%).

In Sweden employers come up against a lack of resources (22%), the low take-up of training (20%) and difficulty in establishing their organisation's training needs (20%). On the other hand, Swedish employees suffer from a lack of senior buy-in/endorsements (20%) and time to attend training and people development activities (18%).



Employers in South Africa:



Employees in South Africa:



Employers in Sweden:



Employees in Sweden:



Learning solutions: a battle or blend of tools

Some of the key tactics employers are using in the race to future-proof learning

On-the-job training

On-the-job training is universally predicted to be a key learning method in the coming years. A third of employers globally say it will become more important in the next 3-5 years, and businesses in the UK, South Africa and Malaysia are particularly firm believers in the future role of on-the-job learning.



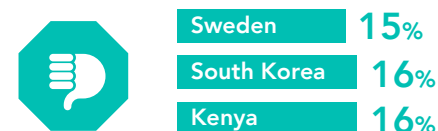
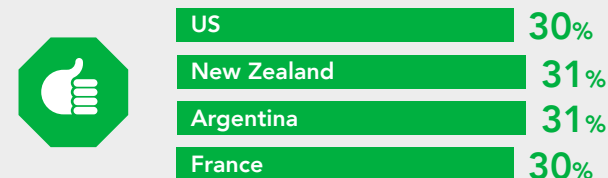
Interactive video

Interactive video, on the other hand, is forecast by US employers to be one of the most important learning technologies or methods in the next 3-5 years. It is also likely to gain traction in Australia, Argentina, Kenya, Malaysia and the UAE.



Peer coaching

Peer coaching often provides deeper insights into workplace strengths and ways to improve than manager coaching can. Employers in the US, New Zealand and Argentina are among the most interested in using this over the next 12 months, and in France employers see it as one of their most significant L&D tools over the next 3-5 years. Meanwhile, employers in Sweden, South Korea and Kenya are less likely.

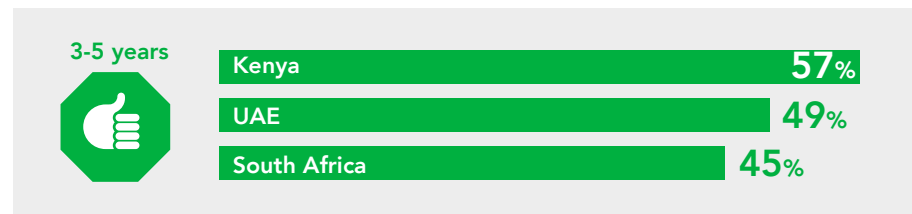


Elearning and online courses

Elearning is top of the agenda for employers in India over the next 12 months with 43% intending to use it. And although it's not top of their lists, it will also be a big focus for South Africa and Australia.

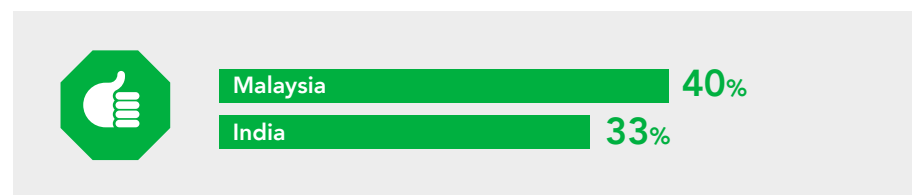


Looking further ahead to the next 3-5 years, elearning and online courses are considered to be one of the most important training methods for employers around the world. Employers in Kenya, UAE and South Africa are the most excited about the technology.



Collaborative and social learning

Employers in Malaysia and India can see the most potential in collaborative and social learning technology in the next 3-5 years, whereas those in the UK and Australia are the least likely to invest in this learning method.

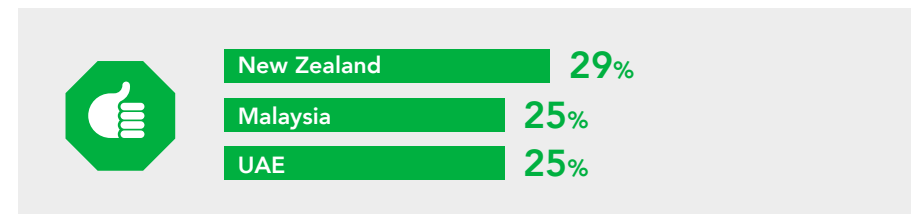


Personalised and micro-learning

As revealed in our first Learning Insights report published earlier this year, employees across the world would like to see more personalised and bite-size content in the L&D they receive. This new study reveals that employers and employees are aligned in this respect: 28% of global employers predict personalised learning programmes will gain importance in the next 3-5 years, and 20% expect to see more micro-learning.

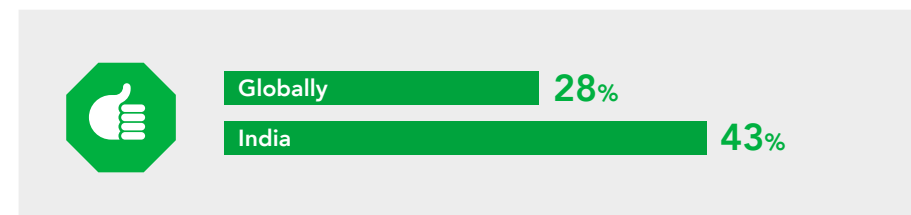
Gamified learning

According to employers, gamified learning methods are most likely to gain importance in New Zealand, Malaysia and UAE in the next 3-5 years. In the US just 11% of employers say this will become more important.



Artificial intelligence

Employers around the world predict artificial intelligence to be one of the top three technologies in the next 3-5 years – and this is especially true in India. US employers are the least enthusiastic, with only 19% believing AI technologies will become more important in their L&D strategies.



In conversation with Paul Grainger



We caught up with Paul Grainger, Co-Director of the Centre for Post-14 Education and Work, and Head of Enterprise and Innovation for the Department of Education, Practice and Society (EPS) at the UCL Institute for Education, to get his views on the economic and societal implications of joined up employee/employer aspirations.

During the process of distilling the Learning Insights data, it became clear that the more closely aligned employers are with their employees in terms of their learning goals and preferences, the greater the potential of their organisational L&D activities.

So we can see how complementary employer and employee thinking can benefit a business. And we know that if we measure the prospects for L&D in these terms, countries around the world vary considerably.

This leads to the question: does the extent to which organisations across a particular country see employers and employees whose learning objectives

and requirements reflect one another give us an insight into their potential as countries of learning, and ultimately their potential to add value to their economy?

To explore this further, we caught up with Paul Grainger, Co-Director of the Centre for Post-14 Education and Work, and Head of Enterprise and Innovation for the Department of Education, Practice and Society (EPS) at the UCL Institute for Education, to get his views on the economic and societal implications of joined up employee/employer aspirations.

“With businesses in these countries, regions and local areas facing different changes and challenges according to the specific economic, cultural, political, demographic and technological factors of their location, they will have to react and develop the skills of their workforce in a way that is specific to their context.

Cities and regions will be more successful if they can develop strategies to help create highly skilled but socially inclusive ecosystems. This will form the basis for links to national and international skills systems, helping them to develop high-performing economies. This is crucial for the future, as we progressively feel the impact of the Fourth Industrial Revolution.

Paul Grainger

Co-Director of the Centre for Post-14 Education and Work, and Head of Enterprise and Innovation for the Department of Education, Practice and Society (EPS) at the UCL Institute for Education

What is required is a conceptual step-change towards a broader, more comprehensive ecosystem model that emphasises education/employer co-production of skills for an inclusive and more equal community that links working and living.

The common theme to the step-change needed is agility. This needs to be developed by all countries and regions in the way in which they operate their

skills ecosystem. It's no surprise that smaller organisations are more agile and flexible than larger ones, as they have the ability to adapt and modify what they're doing in response to the developing ecosystem. In a similar way, the devolution of skills systems to regions and cities can be more effective as they are closer to the needs and strategies of key players in their areas. Economically and politically defined regions can encourage the formation of skills ecosystems that are able to develop in a way which reflects the needs and potential of the area, embracing both employers and educational institutions. Decision makers can interact with or be drawn from the leaders of local institutions, so that lines of communication are closer and more proactive, and are not restricted to the reactive reflex inherent in larger scale configurations.

The foreseeable future is likely to be dominated by emerging digital technologies. These can help individuals and communities to grow, become more agile, develop skills and network with a wider global community. As these technologies are able to transcend borders, they help organisations and the communities in which they are based adapt to the evolving needs of the community and the world at large. They support agility. And as workplace change is increasingly rapid, it is likely that those regions actively engaged in emerging markets will be better placed to manage the tensions between flexibility and predictability.”

dermalogica®



Insights from Dermalogica

The data clearly indicates a need for organisations around the world to keep pushing for more effective, engaging learning and development if they are to stay ahead of the game. We spoke with Dermalogica about how they manage the needs of people in all the different countries in which they operate to make sure that everyone has access to high quality, impactful training opportunities.

From the perspective of the education team

Does your subject matter change depending on the country in which it is delivered?

Our core brand, product and skin therapy training is fairly universal. We try to take a global view wherever we can in product and service development. By designing and developing with global regulations in mind, we can reduce the need for creating too many market-specific pieces or training assets.

Where we do adapt the content for local use, we need to make sure it meets the regulatory framework of a particular country. We might also make changes where there are

specific industry practice standards, or communication norms for interacting with customers, which can differ from country to country.

We may develop and offer different content outside of the core sessions and workshops based on changes or demands within that specific country. However, we always share our sessions through our Global Curriculum Task Force and frequently find that these sessions have value in other regions.

We may also make small adjustments or modifications to address context or language.



Do the delivery methods you use vary?

1. Timing and urgency
2. Geography – how easy it is to travel to by train
3. Facilities available: for example, the accessibility of digital resources, network bandwidth, Wi-Fi or streaming options – broadly how technologically or economically developed a market is. We have developed a wealth of methods for delivering digital education effectively, but we always need to make sure we are matching the level of advancement and technology of different countries and organisations.

Cultural norms can also be very different. For example, if you go to the US and you want to join a workshop, we run a live class but then also have a camera live-streaming the session online at the same time. This works well in the States, where their geography often mandates the use of multimodal learning for the benefit of staff based far away, and for the management of resources. The culture is also inherently more outgoing; if those online need greater engagement, they will tell you, and they aren't held back by not being in the room and don't find it difficult to join a conversation. In Britain, people are inherently more reserved, and the option hasn't worked quite as well, so we tend to separate streamed learning from classroom learning to achieve better engagement.

How do you know if you are getting it right?

Primarily the business results will tell us if we are getting it right, and secondly we operate a very open feedback system with our staff and our trainers.

To help with this, we test programmes with focus groups, management teams and individuals. We use these sessions to critique ourselves, which helps us get clearer about what we are trying to achieve in the session, as well as working out the best ways to describe to others what a training opportunity is all about.

Every session undergoes regular review.

We've learned that how a class is positioned in the first place is SO important. If employees have the right expectations, we will have a far greater chance of them reaching the right outcomes; partly because they are prepared and go into the session knowing what they will get out of it, and partly because we have made sure we are thoroughly clear on the audience and what is important or valuable for them. In other words, "Reach the right audience with content that is relevant".



From the learner's perspective

What keeps you engaged in learning?

For me personally it's having an education pathway. Having the opportunity to further broaden your knowledge on skin, ingredients and techniques supports your ability to deliver a quality service for the business, but what keeps you coming back is knowing that it's an investment in you. It's your knowledge, your expert status; we all have bigger goals and it's good to know that what you are doing has a wider relevance.

What also helps is that the training includes external insights and reflects the wider landscape. You never feel like what you are learning is theoretical; it's all about how you apply it, and connecting you with like-minded therapists and trainers who can understand how it works in their context and share learnings. When learning is highly relevant, you can see the impact more clearly, and that's where it becomes addictive.

Where have you seen the value?

Without the training, I'm not sure I'd still be in the industry, let alone the company. Training has played a big role in my development; I feel like I'm upskilling all the time and it has kept up

my love for what we do. It would be very easy to come in and do the same thing again and again without developing.

I've been with the brand for 11 years – and never once have I felt like I haven't had opportunities to do more training, whether it's on the practical therapy side or on the running of a skincare business.





John Yates

Group Director – Corporate Learning at City & Guilds Group

Businesses worldwide are navigating a period of immense transformation – and this is particularly evident in emerging economies where organisations are embracing technology and honing the skills required to compete on a global stage. But as the workforce becomes more connected and the workplace increasingly mobile, we need to see greater synergy in the way employers are tackling some of these challenges.

Greater alignment and coordination will make it easier for businesses to collaborate across borders, and for individuals to feel they are gaining skills that will keep them fit for work in the future, regardless of where they are from or where they live.

Employers across the world need to listen to their workers' training needs and ensure they continue to focus on upskilling – or risk losing opportunities and employees to other markets who are making this a priority. Equipping workforces with the skills to succeed in the future is a marathon, not a sprint, but those who overlook the importance of skills investment risk dropping out of the race altogether.

Training, upskilling and reskilling the workforce through learning and development programmes is critical if

businesses across the world are to meet the future needs of their economies and societies. This is especially apparent as the increasing use of technology and machines changes the way we work and the skills needed in the workplace.

Our research demonstrates that employers understand the need to train their employees – not only to future-proof their business against external pressures, but also to retain and engage their staff, who in turn realise the value of workplace learning. What's really interesting to observe is how the approach to L&D differs from country to country, as employers shift their tactics to adapt to the distinct challenges they face. Unsurprisingly, as we talk about technology changing the way we work, one thing businesses across the world have in common is a belief that the rise of learning technologies will continue to shape their L&D programmes in the years to come.

Resources



A Risky Business



MicroPersonalNetworks



Discover how we're shaping the future of learning

Everything we do at Kineo stems from a simple idea – if we design a better learning experience, together we'll get better results.

Kineo helps the world's leading businesses improve performance through learning and technology. We're proud of our reputation for being flexible and innovative, and of our award-winning work with clients across the world.

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