



THE MAJOR LEARNING TRENDS AND INDICATORS FOR 2013 AND BEYOND WITHIN THE ASIA PACIFIC REGION

The first comprehensive analysis of learning trends and training provision across the Asia Pacific Region in more than 10 years, complete with European comparisons



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With input & research completed by STADA (Singapore Training and Development Association) under the leadership of

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A Letter from the Managing Director, Cegos Asia Pacific

Dear colleagues in learning and development,

I am delighted to launch the findings of the first major survey across Asia Pacific for more than 10 years, from any source, highlighting the latest learning trends and indicators for the region as a whole. There have been examples of specific research, market centred studies and more, but none as broad as this first annual study by Cegos.

As a traditional training and development corporation expanding our offer and footprint from our European roots, we have been through enormous change over the past few years. We have had to adapt product, content, delivery method and more. We have integrated technology into our solutions and invested time and money to develop the right products and solutions for a more globalised, cross cultural, remote and multigenerational environment. We have had to personalise learning to a far greater degree for organisations and individuals.

In short, we understand the huge shift in our industry and the challenge that Learning Professionals everywhere continue to face.

This study is designed to inform the Learning Community in the Asia Pacific region, of the major trends in how learners learn, their learning preferences, the tools they use to learn with, who they engage to source learning, and more. We will compare findings with those from our recent surveys in Europe to benchmark outputs and predict possible future scenarios.

What is clear is that change is a constant in our industry, and those learning professionals who are agile, flexible, and willing to engage with technology integrated learning will have an advantage. After all we will see the iGeneration in the workforce in less than 8 years, and that will dramatically change the game for learning provision and empowerment – and planning starts now.

One of the main messages to come out of our survey, however, is that new tools and technologies are not replacing traditional methods of training and development, but enhancing them with more flexible ways to learn, more choice of learning format and greater recognition of the increasing power of technology to give learning the edge. That said, the Human Capital within our organisations remains at the heart of learning and development and the human touch is as important as it has ever been.

With my warmest wishes,

Jeremy Blain
Managing Director
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Executive Summary – Key Findings

The Cegos 2012 Pan-Asian Pacific Survey highlights some of the major trends facing the Asian Pacific L&D sector today based on a survey sample of 2,639 respondents from 1,350 organisations across nine Asian Pacific countries as well as comparing with two recent pan-European surveys conducted by Cegos in 2011 and 2012. The survey proved to be a rich source of material. Below are some of the key findings and highlights.

A Strong Commitment to Training in Asia Pacific

- Probably the single most important conclusion from the survey is that Asian training remains in a healthy place with 87% of learners having received training over the past 12 months. This is substantially higher than comparable European figures from both 2010 and 2011 where, according to Cegos, 25% and 21% of employees respectively had not received any form of training. One reason for this is the contrasting economic fortunes of both regions with the Asia Pacific region expected to grow by 6% during 2012, according to the IMF, whereas many European economies are predicted to contract. This growth is leading to increased trade, increased talent development needs, and a hunger to acquire new skills to compete.
- Furthermore, rather than financial incentives, the key motivation among learners towards training is the acquiring of new skills. This is encouraging when addressing the current potential skills shortages and talent crunch in Asia Pacific.

A Vocal Learner Population Ready to Speak Out

- The survey also found that, while almost half of learning is initiated by the employer, there is evidence that learners are playing an increasingly active role in driving their training programmes across the region.
- Led by Generation Y and Millennials, with 54% of the survey sample being 34 years of age or younger, we are seeing a move towards an increased expectation for appropriate development, personal growth and 'life-long learning' and an increasingly vocal learner population. This manifested itself in the survey in a number of ways – for example, the growing numbers in countries, such as India, prepared to pay for their training; the number of people prepared to train outside office hours; and a number of other factors.

Accessibility to Learning is Much More Widespread

- It is this highly driven learner population, along with new technological innovations and mobile learning, that is leading to greater accessibility to learning and the more widespread adoption of learning than anything seen previously. Learning trends leading the way include e-learning, mobile learning, the web, dedicated education sites, and the growth of 'open source' learning provision.



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! Respondents Data

- 2,639 respondents, from over 8 countries across Asia Pacific region, split into 2 distinct groups 2,200 Learners (Employees and Managers) and 439 learning professionals (HR, L&D, training function)

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Yet a Population Whose Training Needs Are Not Always Being Met

- Yet despite these increased expectations, there are significant concerns as to whether these needs are being met – particularly on the part of companies and their HR/L&D Departments.
- Examples of organisations not delivering training include the fact that in countries, such as Singapore and China, where there is widespread smart phone and tablet penetration among the population as a whole, the actual implementation of mobile learning is still in its infancy. In addition, less than one in three Asian Pacific employees go to their HR and L&D departments for information on training and as few as one in ten learners in either Hong Kong or Singapore; and one in four Indian employees cite training being insufficient in their current roles as a key motivator for training.
- Furthermore when asked for their levels of satisfaction on training, the answers are relatively lukewarm compared to European learners as were the answers when specifically asked about the role of companies in providing training. It is figures, such as these, that raise warning signs as to the effectiveness of HR/L&D in meeting learner demands.
- What can we derive from this? Firstly, that there is a lack of dialogue between professionals and the learning community itself and also that some training provided may be considered irrelevant, out of date, or simply not required.

Asian Pacific Training Covers A Broad Range of Skills

- Employees in Asia are training across a broad range of disciplines. Technical skills is the most popular training topic (15% of learners) with India leading the way with almost a quarter training in technical skills (23%). China is more focused on the development of business skills (18%) and management skills (17%) than any other country in Asia and indeed Europe.
- It is this shift toward management and business skills as more and more Chinese companies compete internationally that indicates a potential 'sea-change' in training in China. There is a strong indication of an explosion in training in China over the next few years.

Face-to-Face Learning Still Important As Part of The Training Mix – Online & Blended Learning Continues to Increase in Popularity

- According to the survey, it's clear that classroom training does and will continue to play a crucial role in training throughout Asia and, for many organisations, will be the central cornerstone on which other learning initiatives are based. Today, 79% of Asian learners receive classroom training. This focus on face-to-face learning is also reflected in the growth in coaching/one-to-one mentoring.
- Online learning is the second most popular learning tool used by 58% of learners in Asia – a number that is significantly higher than in Europe.
- Blended Learning is also on the increase in countries, such as Japan and South Korea, Hong Kong and Australia. Individual learners in Singapore and China, however, have less variety in the training methods used with only 17% of learners in Singapore and 7% in China receiving blended learning.
- In the case of Singapore, there is much 'talk' and seeming commitment towards blended learning but this is not reflected in reality – not on



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Popularity of Face-to-face Learning

- Face-to-face learning still popular in all areas, and the number 2 most popular tool is online learning which is increasing rapidly

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account of the learners but largely due to the learning professionals. In the case of China where training has not been as widespread as many other countries, we expect blended learning to increase with the logical first step being face-to-face, prior to the integration of new technologies into the training mix.

- What do these overall results tell us? The results are reflective of a strong cultural bent towards human interaction (particularly for Gen X and older). The survey also highlights how Millennials seem to be the generation to be forcing a change in this mix in such a dramatic fashion through new forms of learning, such as mobile learning (see below).

Mobile Learning and New Innovative Training Delivery Platforms are on the Rise in Asia

- Many Asian employees are also leapfrogging traditional methods to embrace mobile learning. There is a growing trend towards tablet use for online learning across Asia as well as an increased use of smart phones, with India leading the way with 22% of Indian learners using them. In countries, such as China and Singapore, however, there is much new demand that needs to be met.
- Whereas, until recently, mobile technology was almost always used for social purposes (networking, location, groups, Facebook etc), it is clear that the Millennials are driving the move towards more integrating technology-based learning. This represents a shift in mindset towards embracing technology in all forms of people's lives while still retaining the human touch.

India – A Highly Motivated Workforce

- India today consists of a highly motivated and self-reliant pool of employees who are determined to acquire new skills through training but are being faced with organisations unable to meet their growing training needs.
- Almost a quarter (24%) of Indian respondents said that a key motivator behind training was the fact that they were receiving insufficient training within their current role and whereas 47% of Indian learners go to managers for training information, only 25% go to L&D/HR. Furthermore, more Indian employees than in any other country pay entirely for their training themselves (26%).
- For a country where growth has disappointed recently and questions have arisen over economic and educational policies, we can now point to growing evidence of an increasingly disenchanted learner population who are not being given the skills they need and are either seeking these skills themselves or doing nothing.

The Singapore Enigma

- Singapore today remains one of the world's most successful economies with in 2012, the World Economic Forum ranking Singapore as Asia's most competitive economy and second globally behind Switzerland. Furthermore, the Singapore Workforce Development Agency (WDA) is responsible for funding a number of training programmes although often there appears a problem with take-up.



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Mobile Learning

- Mobile learning being embraced as preferred method and tool by Millennials





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- Yet, despite this, many of the survey findings are disappointing when it comes to training in Singapore showing that the reality isn't matching the perception. Few Singapore employees receive blended learning; training by smart phone and tablets is limited; and online learning has not been fully embraced. According to Carsten Rosenkranz, director of business development at e-learning service provider Knowledge Platform, "only about 20 percent of the 500-plus companies registered on the Singapore Stock Exchange are using e-learning in an "effective or advanced way".
- There are signs, however, that this lack of a focus on training is not coming from the learner as Singapore and China are the top Asian countries in regard to learner initiative. What can we draw from this? Are we seeing signs of a disconnect between learners and their organisations? The challenge for HR and learning professional is to ask what they can do better. Organisations need to grab hold of training and make it happen or face being left behind.

The Huge Potential of China

- China remains a country with huge potential for training. Just the last few years have seen massive strides in training adoption with 62% of employees having received training over the past 12 months.
- Other stand-out figures for China include the fact that more people in China are using training to develop their business skills (18%) and management skills (17%) than any other Asian company as well as the country leading the way alongside India in technical skills training.
- While technology take-up in training delivery is relatively low in the survey, it is our firm belief that the training market in China has huge potential and that e-learning, mobile learning and blended learning will come to the fore over the next few years.
- China today has one of the highest mobile phone and tablet penetration in the world, 513 million internet users as of January 2012 (Source: Kenexa) as well as the highest usage of social media. Imagine if all these tools were used to learn? It would change the training landscape both in Asia and across the world forever.
- There is a massive leap in training provision for China, and organisations and training providers need to be ready.

Indonesia – Leading Developing Countries

- Despite being one of the least developed countries in the survey, Indonesia is showing a significant commitment to training with 77% of its employees having been trained over the past 12 months. Furthermore, 44% of employees train after office hours and 26% on rest days, reaffirming their commitment.
- However, in the case of other countries, there are signs that individual trainer needs are outpacing HR and L&D departments' ability to provide them.

Australia - A Well Developed Training Market but Is Smart Phone Adoption and Government Funding a Potential Weakness?

- Australia is a well developed learning market. 100% of Australian learners

! Training in China

- Huge shift on to training in China over the last 12 months - over half the population surveyed received it, reinforcing HR OOT (China) trend forecasts





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Training in Hong Kong

- Training appears to be on the decline in Hong Kong

have done some form of training over the past 12 months with training predominantly driven by the employer and taking place in office hours.

- Technical skills and compliance training remain the most popular form of training ahead of management training with the country leading the way in Asia in e-learning adoption.
- 100% of Australian learners receive blended learning with mobile learning, via tablets, also high. Training via smart phones, however, is yet to take off.
- 37% of training is also government funded, highlighting a potential financing weakness if such funding dries up.

Hong Kong – A Sophisticated Market but Are Some Being Left Behind?

- Clearly, Hong Kong is a highly developed training market embracing the latest technologies.
- Almost 100% of learners receive blended learning and both tablets and smart phones are being used for mobile learning.
- Yet, the fact remains that one in ten people haven't received training over the past 12 months in Hong Kong, despite the economy being so developed. Is this good enough when countries, such as Indonesia, are training so many of their employees?

Malaysia – A Strong Training Culture but is HR/L&D Keeping up with Learners?

- Like Hong Kong, training is prevalent throughout Malaysia. 100% of Malaysians received training during 2012 – testament to Malaysia's economic strategy and its focus on training & development and 34% was government funded. The HR/L&D function also has an important role to play with 30% of learners receiving information on training from HR/L&D. There is also a strong focus on leadership and management.
- However, the fact that 16% of employees are willing to pay for their own training and that more and more people are initiating their own training indicates that Malaysian employees may well be ahead of HR/L&D in their desire to acquire new skills.

Japan/South Korea – Technology Innovators and a Model for China?

- Reflecting perhaps the hierarchical culture, particularly in Japan, training tends to be driven far more by the employer than employee in Japan and South Korea.
- Not surprisingly given both countries' technology prowess, both countries are also big users of e-learning and blended learning and lead the way in technology adoption in relation to tablets and smart phones. They are also particularly satisfied with online learning and gaming – due perhaps to their comfort with both mediums as well as the high quality learning providers in these regions.
- Perhaps Japan/South Korea are showing where China could be in a few years time?

Having taken a look at some of the top line findings and a country-by-country summary, let's take a look at the survey in more detail.

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1. Introduction, Survey Sample & Demographics

The 2012 Cegos Asia Pacific survey is the first comprehensive study for over 10 years that focuses on the latest learning trends, indications and training preferences across the Asia Pacific region.

The survey was conducted by Cegos Asia Pacific, STADA (The Singapore Training and Development Association) and Cegos partners across Asia, and took place through online questionnaires and phone interviews between June and August 2012. We would also like to make special mention of Integrative Learning Corporation, Singapore, for their support with the survey, contributions and survey inputs.

The objective of the survey was to study learning trends across Asia Pacific, highlight wider evolving trends between different Asian Pacific companies, and compare with recent surveys undertaken by Cegos in Europe.

For this purpose, Cegos Group's 2012 pan-European survey of 2,800 employees and 600 HR Directors/Training Managers, published in April 2012, was particularly useful as well as the corresponding 2011 survey, undertaken in January and February 2011, and which had a sample size of 2,500 employees.

The 2012 Cegos Asia Pacific learning trends survey was conducted across a range of small, medium and large enterprises and across a range of age groups and levels within each organisation, with representative data gathered from multiple industry sectors, including public sector and government. The main objective was to secure learner feedback as much as inputs from the learning professional community itself. This combination helped us to analyze and report on similarities and any differences of perspective across the two stakeholder groups.

1.1 The Survey Sample

The survey sample consisted of 2,639 respondents, broken down into 2,200 managers and employees (the learning population itself), and 439 HRD / L&D Managers. Figure 1 illustrates the division between employees and managers (executive workers). 1,350 organisations across nine Asian Pacific countries were represented in the survey with the split as follow:

- Singapore: 675
- China: 357
- Hong Kong: 325
- Malaysia: 301
- India: 298
- Indonesia: 265
- Australia: 224
- Other: 194 (the majority from South Korea and Japan with a smaller number from the Philippines). We will reference Japan/Korea a number of times in the survey.



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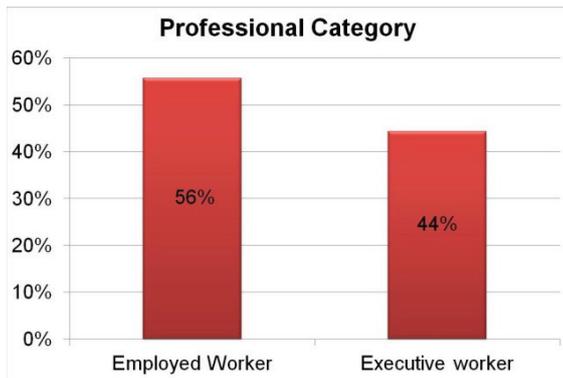


Figure 1

1.2 The Demographics & Sectors

Figure 2 shows the demographics in the sample with around 54% of the survey sample coming from employees 34 years old and below and 45% from those who are 35 years and older.

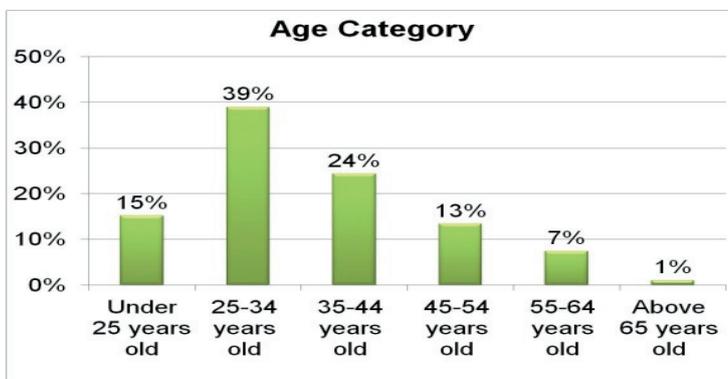


Figure 2

This compares to the age profile of our Cegos 2011 European survey where the sample consisted of 43% who were 34 years and under (figure 3).

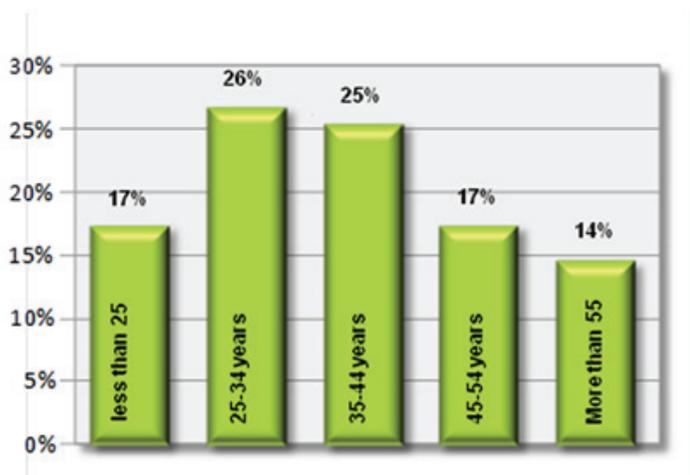


Figure 3

In terms of sectors, the survey covered a broad range from manufacturing (30%) to IT (18%), financial services (17%), construction (16%), and retail (10%).

1.3 The Main Areas of Focus

The survey questionnaire was designed to answer the following questions:

- Who is receiving training?
- What are the key reasons for training?
- Who initiates training?
- What is the main focus of training?
- How is the training delivered?
- What are the learning methods and what is the the role of technology in learning solutions?
- What is the role of HRD / L&D management, employees and their Line Managers concerning the sourcing, participation in and follow up of training interventions? And
- What are the levels of satisfaction with training?

2. Who Receives Training?

2.1 A Strong Commitment to Training in Asia Pacific

The survey results show a strong commitment towards training in Asia Pacific with 87% of those surveyed having received training over the past 12 months and only 13% having not received any training at all. An equally impressive 81% have received training in the past three years. These figures stand up well against European data with our 2010 pan-European survey finding that 25% of employees had not received any training at all – a number that went down to 21% in the 2011 Cegos Europe Survey.

What are the reasons for this strong embracing of training in Asia Pacific? Is it a commitment on the part of Asian Pacific organisations or is it due to economic factors?

Certainly, Asia Pacific growth is predicted to be strong during 2012 with the IMF's Regional Economic Outlook for Asia Pacific predicting growth of 6% during 2012 – well over the 3.5% predictions for the global economy as a whole and compared to an actual drop in growth of 0.2% in the Euro Area (Germany, France, Italy and Spain).

In addition to the economic factors, however, there tends to be a genuine commitment to training across Asia Pacific as a means of acquiring new skills and ensuring organisational success. This was a recurrent theme throughout the survey and is particularly important when facing a potential skills crunch.

These figures also chime in with global figures. For example, a third of organisations have intentions to increase their HR technology spending in the next year as they aim to increase growth and efficiency, according to a September 2012 survey from Towers Watson.



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Training in APAC

- More people being trained in APAC when compared to the 2012 Cegos European learning trends survey

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Training in Indonesia

- Strong commitment to learning and development in Indonesia as fastest growing emerging economy in the region

Asia versus Europe



- Asia leads Europe when it comes to numbers of employees who have participated in training.
- 87% of Asian learners have received training over the past 12 months, whereas in Europe 25% of employees have not received any training at all – a number that went down to 21% in the 2011 Cegos Europe Survey.

2.2 Strong Training Adoption in both Developed and Developing Countries – Malaysia & Indonesia

Figure 4 illustrates the level of training by Asian Pacific country over the last 12 months.

As one can see, the results are impressive with almost all employees in Australia, Malaysia and India having received training over the past 12 months. It is also telling that a country, viewed as ‘developing’, such as Indonesia, is not far behind its counterparts with 77% of Indonesian employees in the survey having received training over the past year.

One reason for this focus on training in the Indonesian workplace is the lack of graduate skills when entering the workforce. A recent report from the Organisation for Economic Cooperation and Development (OECD), for example, concluded that Indonesian university graduates often lack the necessary skills employers need. It’s for this reason perhaps that employers are focusing more on training as a means of making up the deficit.

In addition, it’s important to point out the growth potential of Indonesia. According to a recent report by McKinsey, as of today, there are 55 million skilled workers in the Indonesian economy and a \$0.5 trillion market opportunity in consumer services, agriculture and fisheries, resources, and education. McKinsey predicts that by 2030, this will rise to 113 million skilled workers and a \$1.8 trillion market in consumer services, agriculture and fisheries, resources, and education – a huge opportunity for training!

It’s also encouraging to see that 100% of those surveys have received training over the past year in Malaysia – a country that is facing a difficult job outlook at present and is also classed as a ‘developing country.’ A September 2012 Job Outlook Report by JobStreet.com, for example, found 46% of Malaysian employees saying they will be scaling back on hiring over the next 12 months, with 11% certain they will not be hiring at all. The figures, though, are testament to the country’s strategy and focus on training and development. Education has indeed been cited as one of the Malaysian government’s top five priorities in their stated (and very bold) ambition to be “a fully developed nation by 2020” – a vision that was set out as long ago as 1991.

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2.3 China – Lagging Behind or a Country of Vast Potential?

While at first glance, the survey points to China lagging behind its Asian Pacific counterparts with only 62% of employees having received training over the last 12 months, such a figure should be put into perspective.

Until 2011, there was very little training taking place in China, within this context, a rise to 62% of employees looking highly impressive.

This is backed up by other data. A study by 21st Century Talent in China, across 53 corporations from 10 industries found that 49 out of 53 corporations have provided relevant training in different areas and to different levels within their organisation over the past two years. That's 92.5% out of the survey set, significantly higher than the only survey previously done, in 1996, by Alexandria Surveys and an indication of the growth in training in China.

This focus on training is also reinforced by BDO Financial Services that estimates that overall education and training spending in China will grow at an estimated compound annual growth rate of at least 20% from 2008 to 2013. There's no doubt that there is a lot more to come from China over the coming years.



Figure 4

2.4 Hong Kong & Singapore – Could Do Better?

While still in the high 80's, the fact that at least one in ten people hasn't received training over the past 12 months in Hong Kong and Singapore, despite both countries being among the most developed in the world, is the precursor to a number of other disappointing results in relation to training in these countries.

To some extent, there might be an element of complacency creeping in here. In Singapore, for example, there is plenty of funding for training from the government but often a lack of take-up.

Is it apathy, a lack of understanding of the power of training, or a general

Training and Talent Development

- Evidence of a shift towards training and Talent development in China, but HK and Singapore could do more



arrogance that little training is required to continue to remain competitive? Whatever the attitude, there's no doubt that all these assumptions are fraught with danger and have the potential to have a highly negative effect on both countries' economies moving forward.

2.5 Why No Training?

Of the 19% of those who have not received training over the past 36 months, however, this survey asked the reason why. The most common reason, cited by 14% of respondents who hadn't received training, was that 'there is never any training at my company', followed by 13% who cited the reason being 'we do not know what type of training we require.' In answer to the economic question, 11% said that it was due to 'our company or the economy not doing well.'

3. What are the Key Reasons for Training?

So having seen the strong adoption of training across Asia Pacific, what are the key reasons and drivers behind training?

3.1 A Thirst for New Skills

Overall across Asia Pacific, the survey found that the top three motivators for training today (figure 5) are:

- 1) To develop new skills (17%)
- 2) To refresh existing skills (13%) and
- 3) To enable the individual to do his/her job better (14%).

All three of these options were found to be more significant motivating factors than other common reasons for training such as getting a pay rise (4%) or a promotion (6%).

How does this compare to Europe?

In both Asia Pacific and Europe, there is a shared interest in growing professionally and developing new skills. The 2012 European Cegos survey, for example, found that European employees were most motivated to develop their skills by the prospect of growing personally and professionally, and being able to do their job better. The percentages for this, however, were much higher in Europe with both figures at 65% (figure 6).

What should be noted, however, is that both Asia Pacific and European learners place their desire to improve their personal and professional skills and to do their job better as more important than financial rewards.



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Who Receives Training?

- 87% of all Asian learners have received training over the past 12 months – a higher figure than in Europe.
- Almost all employees in Australia & New Zealand, Malaysia and India have received training over the past 12 months. Hong Kong & Singapore are a little lower.
- 77% of Indonesians have received training over the past 12 months – impressive for a developing country!
- While only 62% of Chinese learners have received training, compared to where training was a few years ago, this is a substantial leap forward.

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Top Motivator for Training

- Acquiring new skills top motivator for training within employee and manager community across the APAC region

Asia versus Europe



- Both Asian and European employees are committed to developing their skills. Whereas 'acquiring skills' is the top motivation for training for Asian employees, 65% of European learners are motivated to develop their skills by the prospect of growing personally and professionally and being able to do their job better.

This focus on acquiring skills couldn't come at a more important time for Asian Pacific companies. A recent study conducted by recruitment specialists Manpower Group, found that the number of Asia Pacific employers reporting difficulty filling job vacancies due to lack of available talent stood at 45%— well above the global average of 34%.

The Manpower Group survey also cites Japan first (81%), Australia fourth (50%), and India sixth (48%) as countries where employers have the most difficulty finding the right people to fill jobs. The talent shortage is least problematic in China (27%).

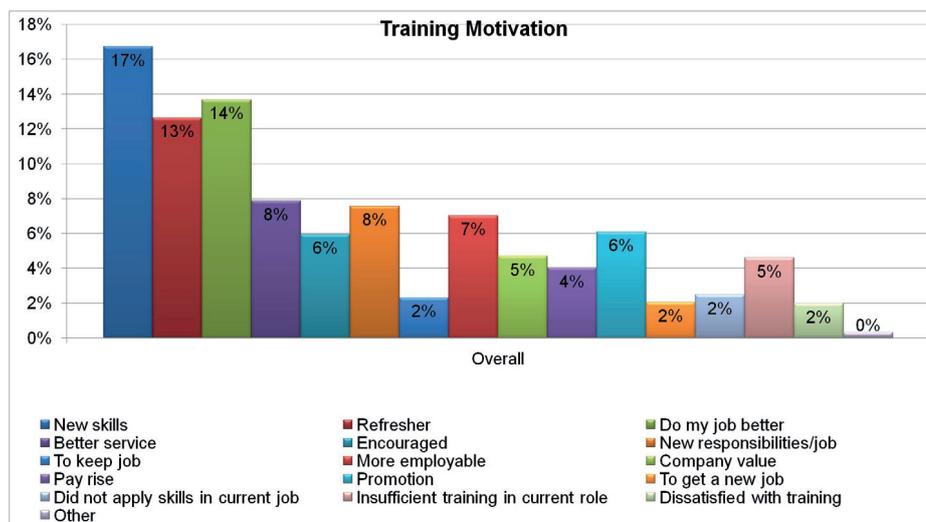


Figure 5



Figure 6

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3.2 Dissatisfaction among Indian Learners? A Cry for Help

Figure 7 shows the different training motivations by country in Asia Pacific.

While there was not much variation on a county by country basis, one figure that stood out was in India where almost a quarter (24%) of respondents said that a key motivator behind training was the fact that they were receiving insufficient training within their current role. No other country had more than 7% of its respondents identifying this as a motivating factor.

With most Indian employees receiving training, this can be considered as a big cry for help indicating that, while they may be getting training, they are not receiving appropriate training.

This figure fits very much into one of the key findings of the report - the 'hungriness' of Indian employees towards training. Reaffirming this, over 25% of Indian employees – the highest number – identified the desire to acquire new skills as a motivating factor. HR and L&D departments should not see this as a threat or a criticism but a massive opportunity to engage Indian learners in dialogue and provide more learning opportunities. The gauntlet has been thrown down!

Indonesia was also close behind at 24% in the desire to acquire new skills, demonstrating the embracing of training in that country. It is likely that this employee demand will result in the 77% who received training over the past 12 months increasing significantly over the next few years.

The desire to acquire new skills in Indonesia can also be linked to a 2010 World Bank Report which found in its assessment of skills in Indonesia that around 30% of employers mentioned the low quality of local training at the university level as a the largest factor behind a perceived skills shortage. Employees are looking to make up for this in the workplace.

Other countries, such as Malaysia (21%) and Hong Kong (19%) put this desire to learn new skills as a key motivation as well, followed by China and Japan/ South Korea. Singapore, however, was the lowest when it came to acquiring new skills as a motivation - another example of the complacency among learners. A potential wake-up call awaits!

At a time of a growing talent crunch across Asia Pacific, it's clear that learners are keen to address the challenge and acquire new skills but are their organisations prepared to do the same?



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Training in India

- Indian learners not getting appropriate training and development, but are hungry for it!





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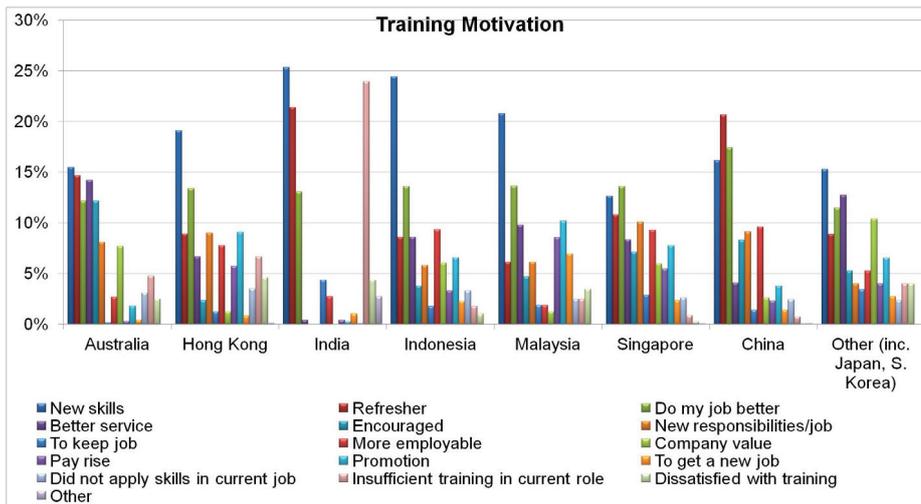


Figure 7

3.3 The Asian Pacific Service Culture

The service culture is also prevalent in India and China with over 20% in both countries citing the desire to provide ‘better service’ to customers as a motivating factor for training.

While this is understandable in India – a key recipient of global customer service outsourcing over the last few years – it is interesting to see the customer focus becoming more prevalent in China as well.

4. Who Initiates Training?

4.1 Learners Lead the Way In Initiating Training

Overall across Asia Pacific, almost half (49%) of all training is being initiated by the employer. This compares to 30% of training being self-initiated and 12% due to legal or professional requirements (figure 8).

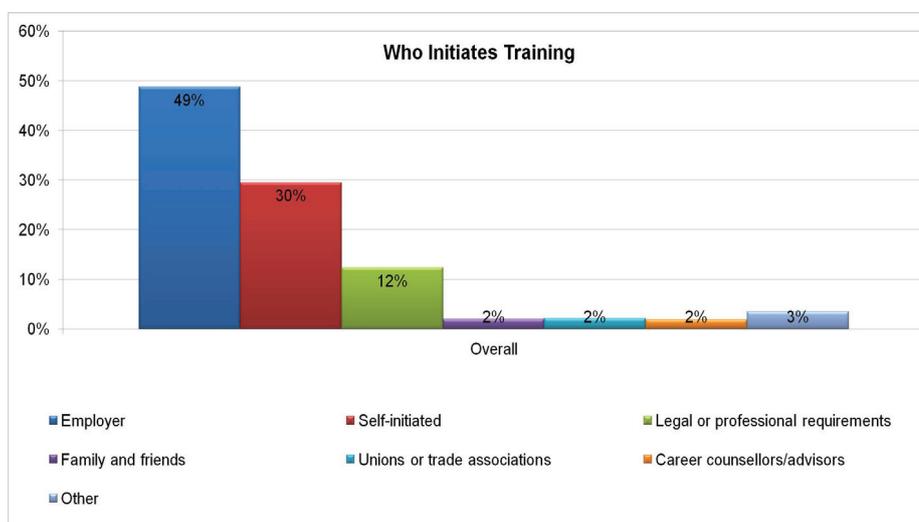


Figure 8

Why do Asian Learners Train?

- The need to acquire skills is the main motivation for training in Asia. At a time of a growing talent crunch, it's clear that learners are keen to address the challenge but are their organisations?
- One in four Indian learners said that a key motivator behind training was the fact that they were receiving insufficient training within their current role. It's time for HR & L&D to step up to the plate!
- 24% of Indonesian employees are also keen to learn new skills, demonstrating the embracing of training in that country.





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What can we deduce from this? The fact that half of training is initiated by the employer is not terribly surprising and can perhaps be attributed to the hierarchical ethos in many Asian Pacific countries and companies, where employees expect their organisation to provide training.

It is of interest, however, that nearly one in three learners are initiating the training themselves – an example perhaps of the acknowledgement of the value of training but also a possible indictment of the companies’ and HR/ L&D departments’ ability to provide it.

How does this compare with Europe?

The Cegos 2012 European survey found that 44% of European employees request or decide on what training courses they undertake, and in a further 38% of cases the decision on training is a joint one between manager and employee. In less than a third of cases employees have no say in the training they will receive. Figure 9 illustrates these results.

European Learner more Empowered for Training

- European learners more empowered when it comes to requesting appropriate training and development than their APAC colleagues

Asia versus Europe



- While Asian employees are becoming more strident in their learner demands, European employees are still ahead when it comes to dictating the terms of their training with 44% requesting training compared to 30% in Asia.

4.2 China and Singapore Lead the Way in Learner Initiative - Others Driven More by Employers

Looking at comparisons between Asian countries, as illustrated in figure 10, there are clear differences.

It appears that employees are taking more initiative and control over their learning in China (43%) and Singapore (35%), in particular, but also Malaysia, Hong Kong and India. This can be compared to Australia, Indonesia and countries such as Japan and South Korea where training is driven far more by the employer (75%, 71% and 62% respectively). In the case of Japan, this is not surprising due to the hierarchical nature of the corporate environment.



Figure 9



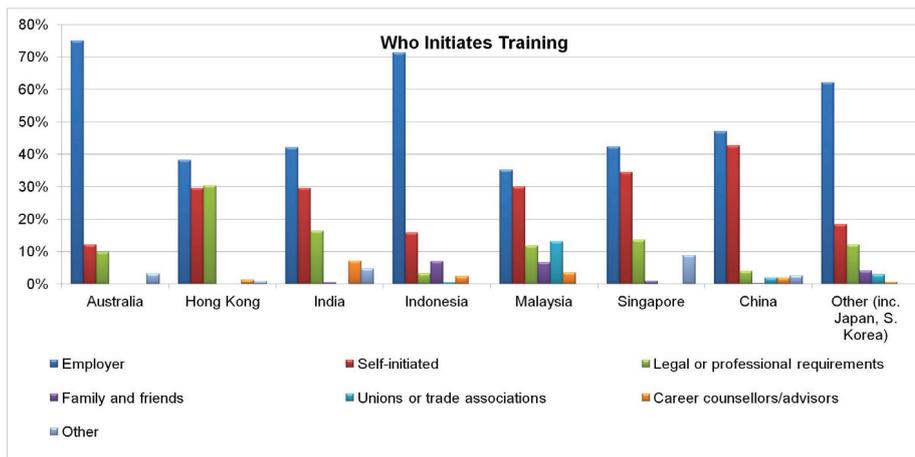


Figure 10

China and Singapore are interesting countries to note. With a number of the survey results reflecting a negative outlook towards the provision of training, the question must be asked whether there are seeds of dissatisfaction with companies' provision of training which could become more marked over the next few years?

Can one surmise, for example, that a greater focus on initiating training by the learner is sometimes the result of frustration that organisations are not providing what the learner needs?

As fits the general picture through this survey, India continues to appear to have a highly motivated and vocal workforce with almost one in three India employees initiating their own training. This again links in to our previous point that there is a general dissatisfaction towards current training. Learning professionals need to get back in control here or they risk losing their authority. The repercussions to the Indian talent pool will be huge and might explain to a certain extent why Indian growth is currently not what it used to be.

In regard to other means of initiating training, neither unions nor trade associations or legal or professional requirements have a great deal of influence. This is again demonstrated by Singapore's massive funding of education and skills but a lack of uptake - a worrying disconnect between the money and the rationale for training which perhaps needs to be communicated and owned more by organisations.

5. The Main Focus of Training

5.1 Training across a Broad Range of Disciplines

The survey also looked at the main focus of training in Asia Pacific and across what disciplines (figure 11).

The results found that employees in Asia Pacific train across a broad range of disciplines from job related technical skills to languages, business skills, management and leadership skills. Overall in Asia Pacific technical skills is the most popular training topic for 15% of learners. This is followed by management skills at 12% and business skills at 11%.

Who Initiates Training?

- Almost half (49%) of all training in Asia is initiated by the employer.
- China and Singapore lead the way in learner initiative.
- Malaysia, Hong Kong and India also have strong learner initiative. This can be compared to Australia, Indonesia and countries such as Japan and South Korea where training is driven far more by the employer.

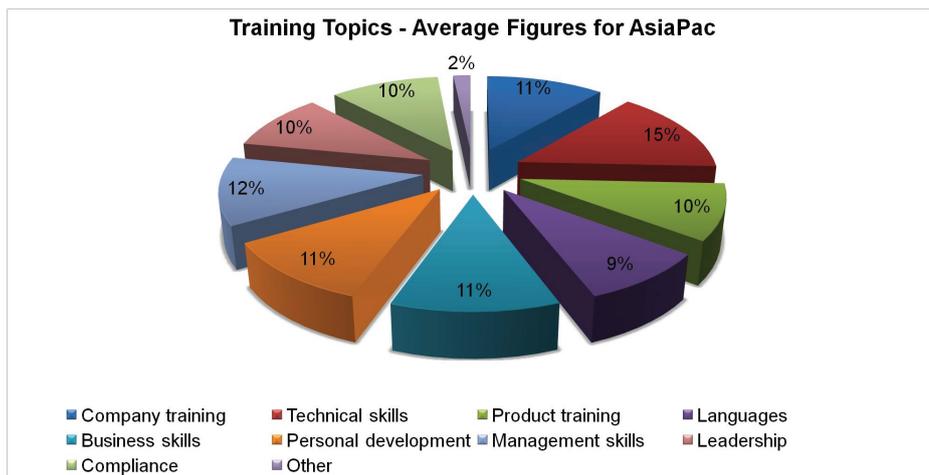


Figure 11

This aligns itself with the data which came out of Europe during the Cegos 2012 survey where the number one training subject was also technical skills – although a higher number at 26% (figure 12).

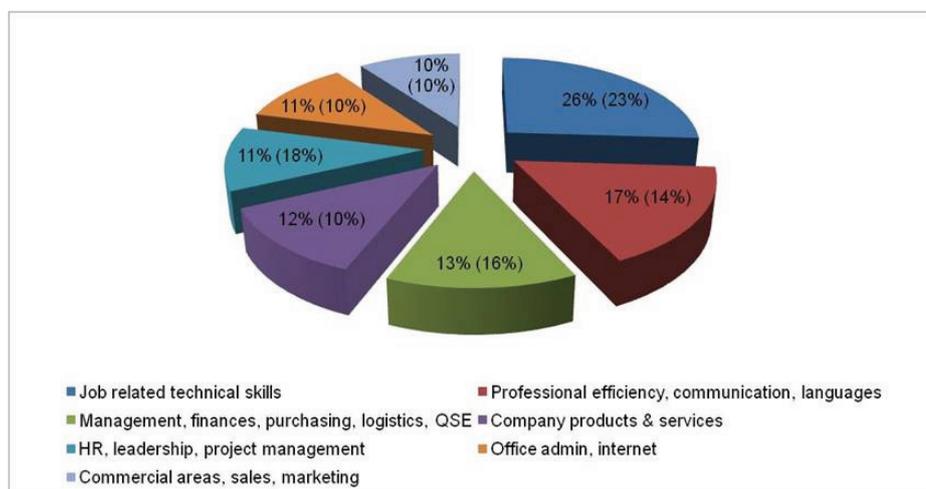


Figure 12

In terms of other forms of training, languages is more popular in Europe (17%) than Asia Pacific (9%). Management skills are at the same level in both countries, reflecting the dramatic rise in Asia Pacific.

Asia versus Europe



- Technical skills is the most popular form of training in both Asia and Europe although Europe leads the way with 26% of learners participating compared to 15% in Asia.
- Language skills training is more popular in Europe (17%) than Asia (9%). Management skills are at the same level in both countries, reflecting the dramatic rise in Asia.



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5.2 India & China Lead the Way in Technical Skills

Figure 13 drills into the survey results further comparing the popularity of training topics across different Asian Pacific countries.

The data shows that more people in India (23%) are undertaking technical skills training than in any other country in Asia Pacific with China being second at 17%. In the case of India, this links in with the need for technical skills in a number of fast growing sectors, such as retail, banking and insurance.

In April 2011, the Chinese government also announced its plans to increase technical training, in order to “optimize its industrial structures and accelerate manufacturing upgrades.” This focus is reflected in our survey figures as is the focus on business and management in China (see section 5.3 below).

Singapore, Australia, Malaysia and Japan/South Korea also invest significantly in technical training – characteristics of strong economies with a wide variety of sectors and sector skills to be addressed.

Australia’s financial services sector, for example, is the largest contributor to Australia’s national output, directly generating 10.8%, according to Innovation and Business Skills Australia, and continues to grow more rapidly than most other sectors with a clear technical as well as a compliance training need. Technical education is also prominent in Japan at the secondary and tertiary levels with this focus reflected in corporate training as well.

Lower down in technical training is Indonesia although we expect this number to increase as the company continues to develop fast and embrace training.

5.3 China Leads the Way in Business & Management Skills but What About India?

In China and other countries, however, there also seems to be a stronger focus on business and management skills. In China, for example, more people are using training to develop their business skills (18%) and management skills (17%) than in all other countries surveyed – figures which are ahead of the Asian Pacific average.



Figure 13

Focus of Training in India and China

- India and China more focused on technical skills training than other APAC countries

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Furthermore, when comparing to European data, China is more focused on the development of business and management skills than any other country in Europe. Figure 12 shows comparative figures in Europe on types of training for 2011 with 2010 figures in brackets. As one can see, China tops the figures for business, leadership and management skills.

It's impossible to overstate the significance of this embracing of personal development in China – one of the key takeaways of this survey and one with huge ramifications for training, training providers, the development of skills in Asia Pacific, and the growth of the Chinese economy as a whole.

China also compares favourably against India in management and leadership training. While leading in technical skills, India is well down the list when it comes to the percentage of employees doing management skills and leadership skills training. Other countries, such as Australia, Malaysia and Singapore, however, appear to be more prevalent in their focus on leadership and management. Hong Kong and Indonesia, however, seem to lag behind in this area.

The lack of a focus on management and leadership training is a potential warning sign for India.

All too often employees are promoted into people management roles because they have good technical skills. There is a danger, however, that they will not receive adequate training and will not be able to understand how their behaviour impacts others as well as inspire future growth. A 2011 World Bank Report cited skills shortages (see The Economic Times article) as one of the major constraints to Indian economic growth. It is important that such skills shortages do not manifest themselves at the management and leadership levels.

There is also a rise in compliance training with countries, such as India, Australia and Indonesia, leading the way. This might well be a reflection of the more mature and enforceable regulatory culture in these countries as well as their global outlook and need to comply with global regulations. While it is not perhaps that surprising that relatively few Chinese employees engage in compliance training, it is perhaps more noteworthy that in Malaysia, only 4% of employees surveyed had been involved in compliance training.

5.4 An Increase in Language Training

Language training is also seen to be on the increase.

In Indonesia and Japan/South Korea, for example, languages are more popular than in other countries in Asia Pacific with training to develop language skills undertaken by 16% of respondents in both regions.

This dramatic investment in language training can be put down to a number of reasons. As the Japanese and South Korean economies shrink, for example, such countries are looking to compete better internationally, integrate new talent, and communicate more flexibly across borders. In the case of Indonesia, as the fastest growing developing economy in the region, it shows the country's understanding of the power of international trade and the

Increasing focus of Training in China

- Noticeable trend in China on personal development and management skills training focus

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importance of being able to communicate better across borders.

China and India's strong economic expansion have boosted Indonesia's exports of coal and palm oil, while the revival of car production in the US and elsewhere have also increased the export of rubber, rubber products and base metals

Language training is also much lower in Australia, India and Malaysia – an acknowledgement of the good standard of English in these regions in what is accepted as the business language of choice across borders. Language training is yet to take off in China, however, illustrating the country's insularity.

For a country manufacturing some of the world's leading products, it is also surprising that product training ranks so low in China. In countries, such as India, Australia and Japan/South Korea, it is much higher.

6. Who Pays for Training and When Does it Take Place?

6.1 Employers Pay for the Bulk of Training

The survey found that 55% of training across Asia Pacific is paid for completely by the employer (figure 14). This compares to Europe where there is a greater focus and willingness on the part of employees to pay for their training. The Cegos European L&D survey 2012, for example, found that 58% of trained employees in Europe would be prepared to pay all or part of the cost of their training.

One observation based on this is that the lack of training budget is forcing the issue in Europe with learners driven to alternative measures. While growth in Asia Pacific means that budget is still available, it needs to be spent wisely as learners in some quarters are not getting what they need.



Figure 14

Asia versus Europe




- There is currently a greater willingness for employees to pay for their own training in Europe than in Asia. 55% of training across Asia is paid for completely by the employer.



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The Main Focus of Training

- Asian training takes place across a broad range of disciplines.
- India & China lead the way in technical skills.
- In China, more people are using training to develop their business skills (18%) and management skills (17%) than in any other Asian and European country.
- India, however, lags behind in business/management skills training. A concern for the future?
- Japan/South Korea and Indonesia lead the way in language skills training – a need to compete more internationally?

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Having made this comparison though, the fact that one in ten employees in Asia Pacific pay for training solely on their own demonstrates a commitment to training which chimes with many of the other findings from this survey.

In regard to other sources of funding, 18% of employee training is paid for by government funding and 14% through a mixture of employer, employee and government. Again, one can see that funding for training in Asia Pacific is available but learners are not taking it up as much as they could be. This could be down to apathy or no perceived need. There is a huge need for these countries to stay competitive and yet paradoxically less and less people are getting the learning they need.

6.2 Chinese Companies Pay for Training Whereas Significant Govt Funding in Australia, Malaysia and Indonesia

When comparing who pays for training on a country-by-country basis (figure 15), there are differences. In China, for example, 94% of all training is paid for by the company - by far the highest number and well up on the pan-Asian Pacific average of 55%. This is followed by Hong Kong on 59% and Singapore on 56%.

It is also interesting, however, to observe the extent of government funding in some countries – in particular, Australia (37%), Malaysia (34%) and Indonesia (25%). With current public deficits under such strain worldwide (but clearly more so in Europe), is this an over dependence that might affect training funding in these countries in the future?

Such a dependence also potentially has the negative effect of reducing companies' willingness to put training money on the table themselves. This indicates a potential lack of proper focus in regard to organisations' L&D strategies and the ability to identify the real trainings needs within the organisation. This is reaffirmed by the data that many learners are taking it upon themselves to provide their own training.

6.3 Countries Where Employees are Prepared to Pay

When examining in what countries employees pay for their own training, a particularly strong commitment to learning and self-improvement can be found in India where more employees than in any other country pay entirely for their training themselves (26%) – another example of the self-reliance and embracing of training by Indian employees. This willingness to pay for training is also found in Malaysia (16% of employees) and Indonesia (10%).

Not surprisingly in countries where organisations pay for the majority of training courses, such as China and Singapore, there are very few employees who pay themselves (China – 2% and Singapore 8%).

In China, this is also very much down to the prevailing culture and less willingness on the part of learners to take control of the training themselves – 'the party knows best' approach.

Financial Contribution to own Training

- Indian, Indonesian and Malaysian employees and Managers willing to contribute financially to their own development

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Figure 15

6.4 The Office Remains the Main Venue for Training

Another indication as to the commitment to training can be found when determining where the training takes places (in or outside office hours or on rest days) as is illustrated in figures 16 and 17.

The results found that the majority of learners (65%) across Asia Pacific are training during office hours, 21% after office hours on working days and 14% during off/rest days. This compares to Europe where the 2012 Cegos survey found that 75% of trained employees in Europe would be willing to train outside working hours.

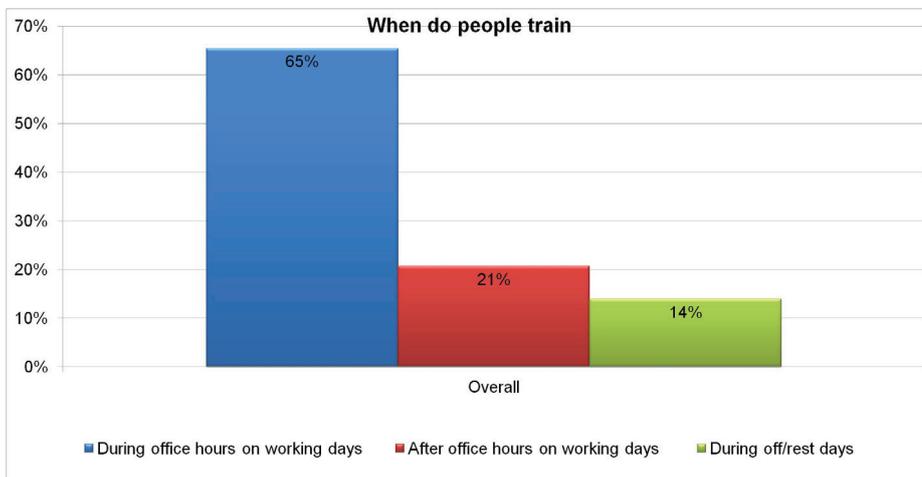


Figure 16

Why might this be? Is it cultural or is it due to the fact that in many parts of Asia Pacific working hours are longer, with workers starting perhaps not as early as European counterparts but often working late, reducing additional flexible time to take training.

Learners in Australia, China and Singapore have the highest percentage of workers training in office hours (greater than 80%) followed by Malaysia (71%). This compares to countries, such as India and Indonesia, where only 35% and 30% respectively train during office hours.

Financial Contribution to own Training

- Europeans more willing than their Asian counterparts to develop their skills outside of working hours



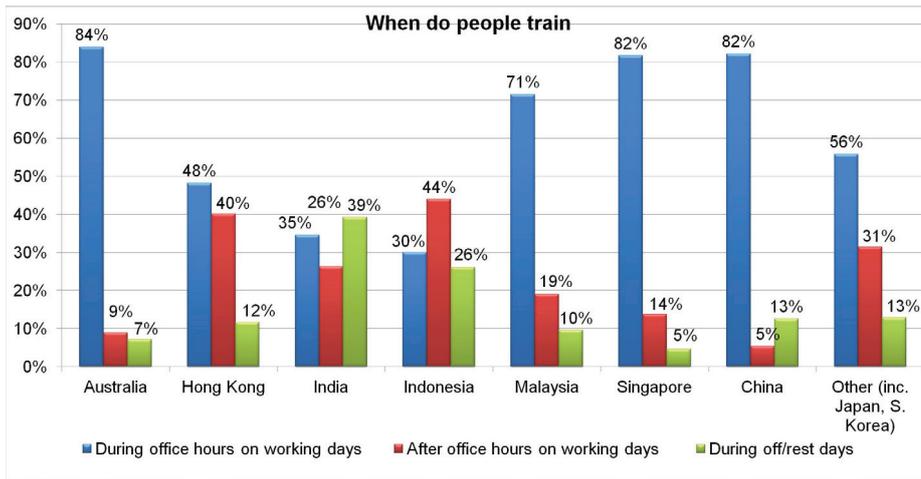


Figure 17

What do the last figures mean? Does it mean a lack of commitment on the part of the employer towards training? Is there again a growing gap between employer and employee?

What is clear is that if training isn't being conducted in office hours, employees take it upon themselves to acquire new skills after the end of the working day. In India, for example, 39% of learners train during off/rest days and 26% after office hours on working days – another example of India's commitment to self-improvement.

Indonesia also has high figures in this regard with 44% training after office hours and 26% on rest days. In such countries, the boundaries are continuing to blur between work and home life in today's time poor society.

In Indonesia, all the signs are that a strong learning culture has been developed with a willingness to focus on training, such as languages, after office hours. Hong Kong is an interesting one. The fact that so many employees are willing to train after hours demonstrates a clear difference with mainland China.

In countries, such as Australia, however, only 7% train on off/rest days and in China only 5% train after office hours on work days. In these countries, training and the office tend to come hand in hand.

7. How is Training Delivered Part 1 – The Different Forms of Training

7.1 The Classroom Still Leads the Way

When asking what modes of learning are the most popular (figure 18), the survey results found that face-to-face training is the favourite delivery option across the board. Across Asia Pacific, 79% of learners have experienced classroom training. This was followed by online learning (58%) and on the job training (54%).

The classroom training is consistent but a little lower than Europe with Cegos' 2012 and 2011 European survey findings that 90% of people in Europe who

Who Pays for Training and When Does it Take Place?

- 55% of training across Asia is paid for completely by the employer.
- In China, 94% of all training is paid for by the company - by far the highest number and well up on the pan-Asian average of 55%.
- The majority of learners (65%) across Asia train during office hours.
- In India, 39% of learners train during off/rest days and 26% after office hours on working days.
- In countries, such as Australia, only 7% train on off/rest days and in China only 5% train after office hours on work days.

take training courses do so in classrooms, making it by far the most popular training channel although use has declined slightly over the past few years (figure 19).

What can we conclude from this? It is clear that in Asia Pacific as well as Europe the human touch remains essential to learning and development today. In Asia Pacific, the prevalence of classroom training is also often down to cultural variables and the importance of face-to-face interaction.

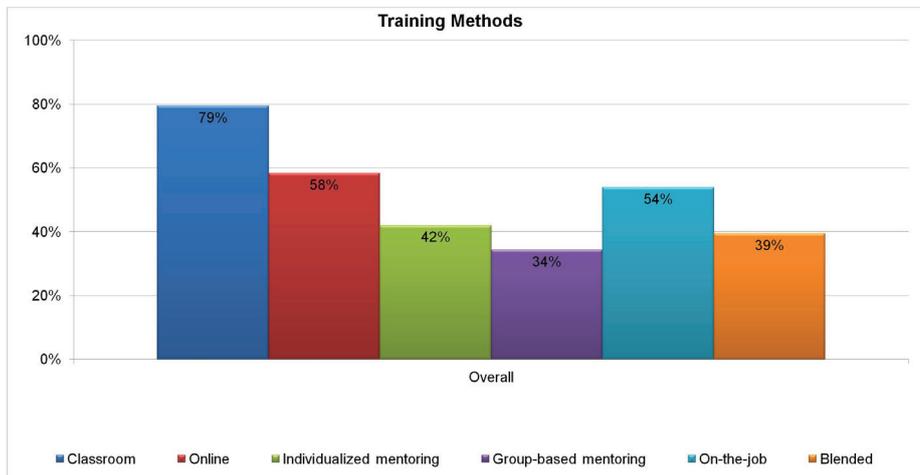


Figure 18

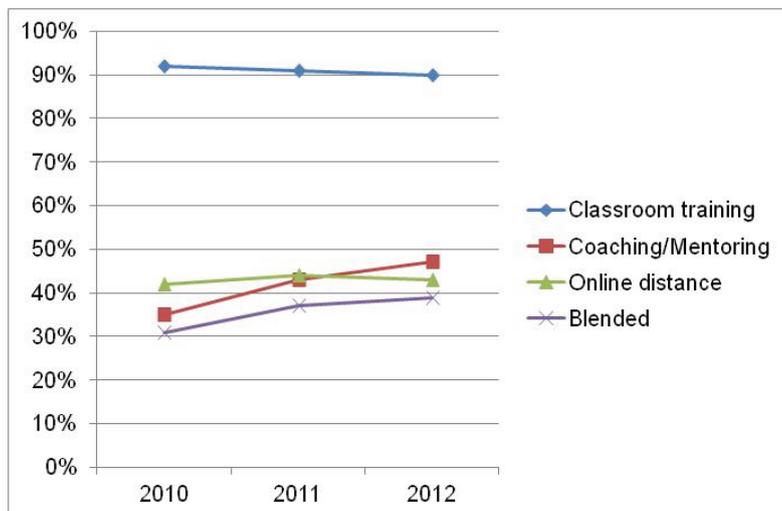


Figure 19

Asia versus Europe



- The majority of learners in both Asia and Europe are participating in face-to-face training in the classroom. Across Asia, 79% of learners have experienced classroom training compared to 90% of European learners.
- 58% of Asian learners are participating in online learning compared to only 43% in Europe.
- Both Asia and Europe are embracing coaching.
- Across Asia, 39% of learners have encountered blending learning – an identical figure to Europe

7.2 Face-to-Face Still Prominent With On-the-Job Training and Coaching on the Rise in Asia Pacific

Classroom training is also backed up by the embracing of coaching or one-to-one mentoring as well as on-the-job training.

The 2012 Asia Pacific survey found that 54% of learners across Asia Pacific receive on-the-job training, 42% one-on-one mentoring and 34% group-based mentoring.

While the Cegos 2012 European survey didn't examine on-the-job training and group-based mentoring, it did look at coaching which has made dramatic progress in Europe – up from being adopted by 35% of learners in 2011 to 47% in 2012. While slightly behind, the Asian Pacific figure of 42% still remains promising and has also received considerable take-up in Malaysia and Australia as can be seen in figure 20 which examines different training methods by country.

On-the-job learning is also an important figure here, indicating that much more is done as part of the job when it comes to training.

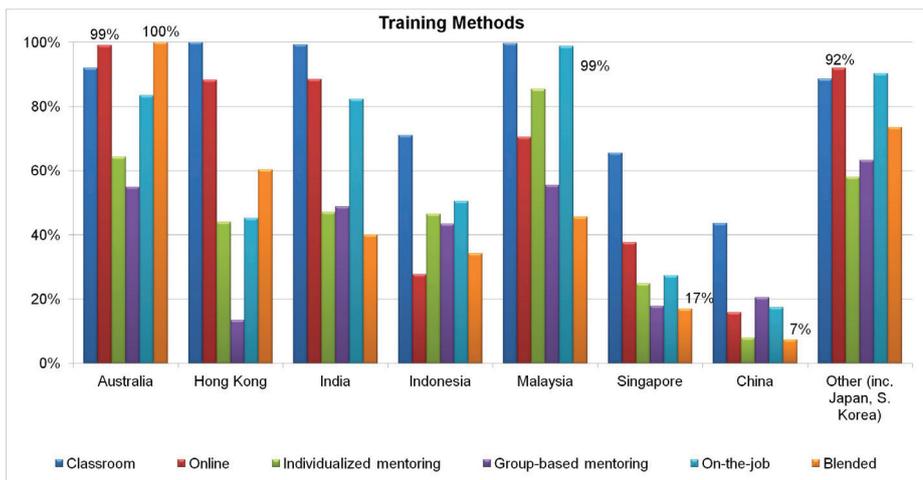


Figure 20

The coaching figures also back up previous coaching research such as the 2008/2009 Global Coaching Survey by Frank Bresser Consulting which found that in Japan, Malaysia, Singapore and South Korea, coaching is widely accepted and used as a business tool, whereas in countries, such as India and China, it remains in its infancy. Our survey finds this to definitely be the case in China but not so much in India.

What we are seeing is that coaching is beginning to have a positive impact among Asian Pacific senior executives and this is now increasingly filtering down organisations. Senior executives are coaching their managers more effectively and line managers are coaching their teams more effectively resulting in a whole host of benefits for individuals as well as the organisation.



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Face-to-face Intervention

- Face-to-face interventions still most widely used - the Human Touch is as important as ever





BEYOND KNOWLEDGE*

Use of Online Learning

- Use of online learning as a key developmental mode across Asia Pacific is ahead of Europe

Training Methods by Country – A Snapshot

- **Australia:** Classroom, online and blended learning – almost 100% penetration; Coaching well above average at 62%; On-the-job training also prevalent.
- **Hong Kong:** Full adoption of classroom training; online learning embraced by over 80% of learners; coaching adoption below average.
- **India:** Full adoption of classroom training and close to full adoption of online learning; blended learning lagging behind.
- **Indonesia:** Strong classroom learning adoption; online learning slower.
- **Malaysia:** Well developing training market with classroom and on-the-job learning leading the way; biggest user of coaching.
- **Singapore:** Disappointing in all forms – particularly coaching and blended learning.
- **China:** Less developed in all areas – particularly coaching and blended learning.
- **Japan/South Korea:** Well developed; online learning at 92%; Blended learning also high.

7.3 Online Learning in Asia Pacific Ahead of Europe And Gathering Pace

Classroom learning is followed by online learning in terms of take-up (online/computer based learning, CD-ROMs, web-based modules) which is used by 58% of learners across Asia Pacific – a number which is significant highly than in Europe. In the Cegos 2012 European survey, the use of online distance learning (e-learning and virtual classrooms) across Europe was actually down from 45% in 2011 to 43% in 2012.

So why is e-learning in Asia Pacific ahead of its European counterparts?

While the market for e-learning still remains larger in Europe, a February 2010 from Ambient Insight 'The Worldwide Market for Self-paced eLearning Products and Services: 2009-2014 Forecast and Analysis' predicted that Asia Pacific would surpass Europe by 2014 in a market forecast to be worth US\$46.9 billion by 2014

The authors of the report commented that “while the adoption of e-learning as an alternative to traditional face-to-face classroom learning or as part of a blended learning solution has lagged behind in Asia Pacific, this is now changing fast.” Our report backs this analysis up.

With Asia Pacific being the largest region for internet users (figure 21), the use of e-learning is expanding rapidly with Asian Pacific companies discovering that e-learning can provide quality and consistency in training and performance standards, reduce time and costs, deliver returns on ROI, and be easily updated in response to fast-changing conditions.

What we are seeing here is a willing and technology adept populace who are willing and able to leverage technology and mobile access to get what they need, where they need it, when they need it and with whom they want.

With many learning professionals not so familiar or willing to understand these tools, much of this technology engagement is also taking place externally

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through outside suppliers.

Whereas a strong internal social media focus and collaboration within learning strategies could actually enhance and engage learners, going external might well reinforce the already high turnover of people so often seen in Asia Pacific. With companies continuing to globalise, an increase in cross-cultural teams and the need for remote working, we are seeing a dramatic shift in technologies from social to education and learning ends.

7.4 Australia and Japan/South Korea Lead Pack in E-Learning but What About Singapore?

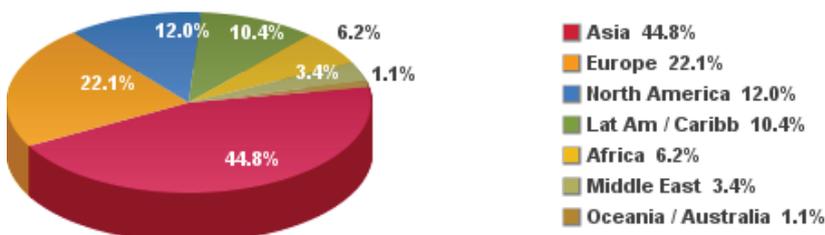
When looking at the different types of online learning by country, the key users of online learning are Australia (99%) and Japan/South Korea (92%) with countries, such as Indonesia, lagging behind. Indonesia, however, has the opportunity to learn from the global evolution in technologies and tools in learning and to get on board with the very best and latest proven elements to leap-frog countries that have taken longer to adopt e-learning.

Japan and South Korea are interesting countries to study here. In Japan, e-learning is localised and highly specialised with gaps in areas, such as professional development and soft skills. South Korea is probably the most advanced e-learning country in the world but again is very local with little exported across boundaries.

Slightly surprising is the low score here posted for Singapore at below 40%, one of the more developed countries in Asia Pacific but not a big embracer of online learning, strengthening our hypothesis in this survey that Singapore is not embracing different forms of training as much as it should and as much as its' economic standing suggests.

This backs up an interesting but worrying quote from Carsten Rosenkranz, director of business development at e-learning service provider Knowledge Platform, who estimates that “only about 20 percent of the 500-plus companies registered on the Singapore Stock Exchange are using e-learning in an “effective or advanced way” (E Learning Answer, July 2012).

Internet Users in the World Distribution by World Regions - 2011



Source: Internet World Stats - www.internetworldstats.com/stats.htm
Basis: 2,267,233,742 Internet users on December 31, 2011
Copyright © 2012, Miniwatts Marketing Group

Figure 21



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Who Widely Use Online Learning?

- Australians, Japanese and Koreans most widely use online learning in some form or another



What about e-learning in China?

While posting a relatively low number in this survey, it remains our strong belief that the e-learning Chinese market has huge potential - especially with the increasing number of managers within Chinese multinationals, the mix of cultures and remote staff, and the growing take up of technologies. A recent report by social media consultancy, Market Avenue, for example, anticipated that the annual growth rate of China's corporate e-learning is likely to be around 40%.

While China posted relatively low scores in all categories, illustrating that the training sector in the country still remains very much a work in progress, we expect these numbers to change dramatically. Watch this space!

7.5 Marked Variations in Blended Learning

It is also interesting to note how in some countries, blended learning is all encompassing but in other countries, has hardly taken off.

Across Asia Pacific, 39% of learners have encountered blending learning – an identical figure to Europe as can be seen in figure 19.

However, when comparing by country, there are marked variations. In Australia, for example, 100% of learners receive blended learning with Japan and South Korea and Hong Kong following behind. Individual learners in Singapore and China, however, have less variety in the training methods used with only 17% of learners in Singapore and 7% in China receiving blended learning.

Can we draw any conclusions here? Certainly, it is to be expected that the more mature training markets, such as in Australia, Japan and South Korea, are likely to have adopted blended learning as compared to countries, such as China. Singapore, however, again remains an anomaly.

Again there's lots of talking in Singapore. One organisation, however, that is not just talking but actually doing is Integrative Learning Corporation, a Cegos partner. Their own experience this year is that customers are willing to talk blended and e-learning but remain reticent about executing either due to previous perceptions, budget or timing and a lack of willingness to take a risk...even though the learning population (as our survey shows) is in favour and actively demanding it.

One other interesting take on blended learning is the varied demographics across Asia Pacific in terms of different generations working side by side. Such significant demographic disparities between countries play well to blended learning and its flexibility to deliver training which meets the needs of all employees – no matter what generation.

While blended learning remains below a number of other forms of training, the increased accessibility of online learning and an emerging 'readiness' to integrate these types of activities with more traditional, face-to-face learning methods is likely to see the increased emergence of blended learning over the next few years.



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How is Training Delivered – The Different Forms of Training

- 79% of Asian learners have experienced classroom training compared to 90% in Europe. Coaching is on the rise with 42% having received coaching.
- 58% of learners across Asia use e-learning in their training compared to 43% in Europe.
- Australia (99%) and Japan/South Korea (92%) lead the way in e-learning but what about Singapore?
- 100% of learners receive blended learning in Australia – only 7% in China.
- Across Asia, 39% of learners have encountered blending learning.

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8. How is Training Delivered Part 2 – Delivery Mechanisms & Duration

So what are the delivery mechanisms for receiving training?

The growth in smart phones and tablet computers such as the iPad, combined with a faster and cheaper telecommunications infrastructure, is set to have a significant impact on how Asians live their lives, and how they work and learn over the next few years. This is also reflected in our survey results.

What we are seeing is a dramatic shift in mobile penetration, social networking and now a willingness to use technologies in far more areas than just social.

8.1 Smart Phones, Tablets & Laptops – Asia Pacific Has Gone Mobile!

As figure 22 illustrates, across Asia Pacific, it is laptops and desktops which lead the way being used by 41% of learners followed by tablets at 28% and smart phones at 15%. Therefore, a cumulative total of 43% are embracing mobile learning.

While the prevalence of laptops and desktops is to be expected, it is interesting to see tablets and smart phone becoming increasingly used to deliver training – an example of many Asian Pacific employees leapfrogging traditional methods to embrace mobile learning.

Today, it is in fact Android which leads the way in Asia Pacific with 52% of smart phones sold in the whole of Asia Pacific running on the Android operating system.

The use of mobile learning in Asia Pacific is slightly ahead of Europe where the 2012 Cegos Europe survey found that mobile learning had risen from 21% in 2011 to 25% in 2012 among trained users (the survey does not breakdown figures according to tablets and smart phones).

8.2 Tablets Are Taking Over!

In regard to tablets, Japan/South Korea lead the way (42%) closely followed by Australia at 41%, Hong Kong at 36%, Indonesia at 31%, Malaysia at 30%, and India at 29%. Singapore is then down at 20% and China way back at 5%. For China, it's clear that tablets are being used for social reasons although it is only a matter of time before they are used more for business purposes.

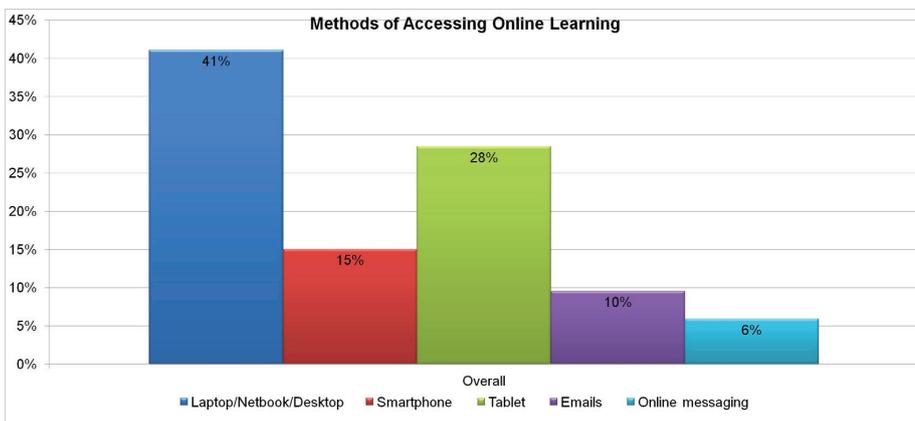


Figure 22



BEYOND KNOWLEDGE*

Mobile Learning in Asia Pacific

- Asia Pacific leading the way in mobile learning, with Tablet use on the increase.

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8.3 India, Hong Kong & Indonesia Are Ahead on Smart Phones

Still on the subject of mobile learning, it is worth noting the continued rise of smart phones, with India the greatest user of smart phones for learning at 22% (figure 23) although Hong Kong and Indonesia are closely behind.

The Indian statistics are backed up by other research. Mobileyouth.org, for example, predicts that by the end of 2012, one in five of all mobile phones in use worldwide will be owned by a young person in India.

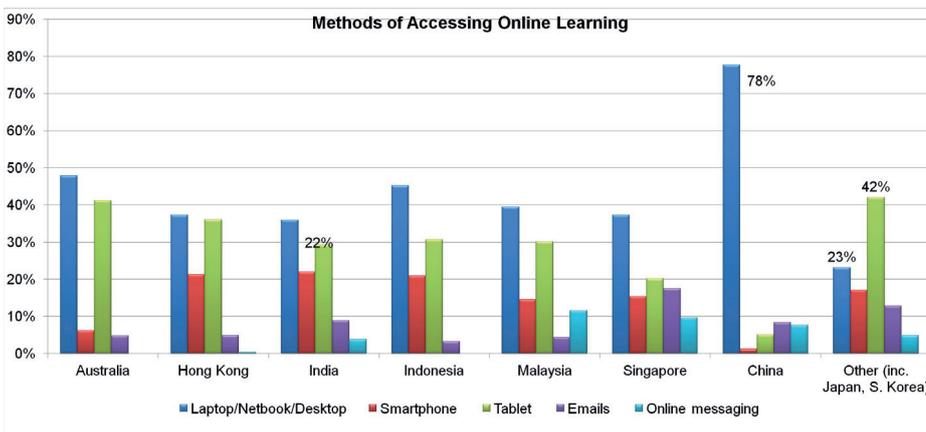


Figure 23

Surprisingly for developed and technology adept countries, however, little learning is taking place on smart phones in Australia. Singapore is also surprisingly low at 15%, particularly as according to Mastercard research (figure 24), Singapore leads the world according to smart phone and penetration.

With Asia Pacific having 10 of the top 20 countries in the world by mobile phone usage (source: Wikipedia), it is clear that the platform is here for future growth. According to IDC, for example, smart phone penetration in India is still currently among the lowest in Asia/Pacific, demonstrating how much untapped potential remains.

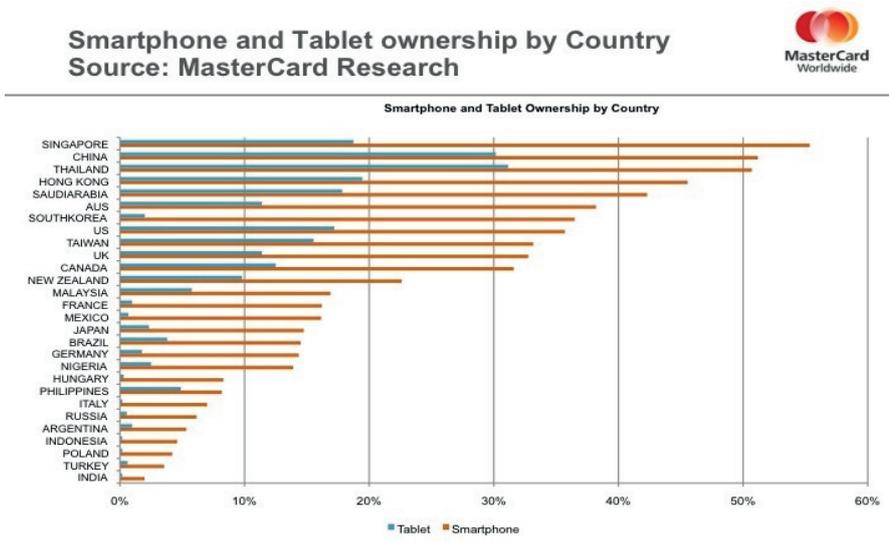


Figure 24



BEYOND KNOWLEDGE*

Tablets for Mobile Learning

- Mix by country of smartphone usage and Tablet usage, with Tablets showing highest potential as main mobile media for learning in the near future

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8.4 The Influence of Generation Y?

Can we attribute this growth in mobile learning to the rise of millennials? Possibly, yes.

Although we are unable to break down figures according to different learner generations in this survey, there are plenty of statistics to point to that demonstrate the growing influence of younger Asian Pacific learners on the workplace.

India, for example, has one of the youngest workforces among the world's largest economies with a median age among the population of 25 (as compared to 34 in China) (Source: Morgan Stanley).

However, conversely in Japan, a leader in the use of tablets, over 26% of the population are over 65 and a 2008 UBS report, using United Nations data, found that four of the world's 10 fastest ageing populations are in Asia Pacific – Japan, Singapore, South Korea and Hong Kong.

With a number of these countries faring well on the use of tablets and smart phones despite their ageing workforces, attributing the growth in technologies to the prevalence of younger generations is not as clear-cut as some might think.

Furthermore, it's also worth considering the next generation that will be entering the workforce – even more technologically conversant! The implications of this will be as dramatic as an ageing population and demonstrates a massive need for business and learning to embrace technology to attract future talent.

8.5 China – Hanging to the Desktop but Expect Change

On the other side of the spectrum, Chinese employees are clearly continuing to rely on laptops and desktops (78%) with a minimal embracing of new technologies to date for learning purposes. While mobile technology is embraced for social purposes, it is just separated more dramatically than any other country from the business & learning environment.

However, this is likely to change. According to the International Data Corporation (IDC) Worldwide Quarterly Mobile Phone Tracker, China will account for 26.5% of all smart phone shipments in 2012, compared to 17.8% for the United States.

While it will take some time for such phones to be used for training, the tools of the trade are clearly starting to be adopted. This is also backed up by figure 24 which shows China second only to Singapore in terms of smart phone penetration.

8.6 HR & L&D – A Potential Road-Block

One additional observation when examining technology-delivery mechanisms is asking the question – how open are companies and their HR and L&D



BEYOND KNOWLEDGE*

Use of Smartphones and Tablets in China

- China using smartphones and tablets mainly as social tools for now, but if trends elsewhere in the world are mirrored, that is set to change over the next two years

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departments to embracing these new forms of technology delivery? Are too many organisations, for example, simply failing to harness and react to what is a highly 'technology savvy' audience and that more imagination and innovation is required in the different training delivery mechanisms they provide?

With there clearly being tablet and smart phone penetration in countries, such as Singapore and China, there appears to be a lack of 'political' will from organisations and HR/L&D in utilising these new technologies for learning.

Learning professionals, who are largely generation X or older, have to 'get with it'. They need to work harder at understanding, embracing and integrating these new technologies. Otherwise, the gaps between learners and HR/L&D are likely to become even larger.

8.7 Asian Pacific Learners Still Opting for Days Rather Than Hours

When asked their preferred duration for training, overall in Asia Pacific the most popular choice of duration was two days (figure 25) with half a day for e-learning. Even online learning was viewed as ideally taking a day in India and China (figure 26).

Repondents in Singapore have a preference for longer training courses regardless of the type of training intervention aside from online learning. In comparison, India has a preference for shorter training courses aside from blended learning which India learners suggested should take two days.

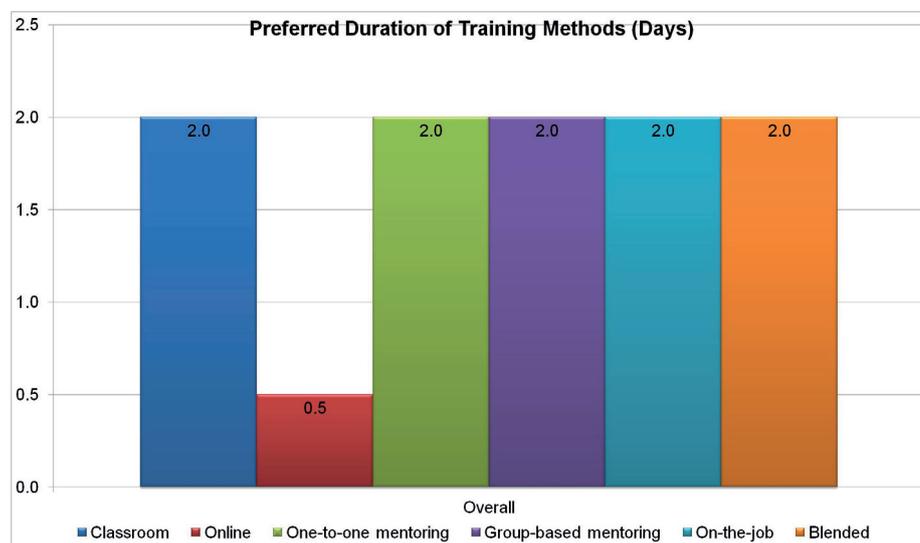


Figure 25

Who Prefers Longer Training?

- Singaporeans prefer longer interventions, regardless of mode of learning according to our survey



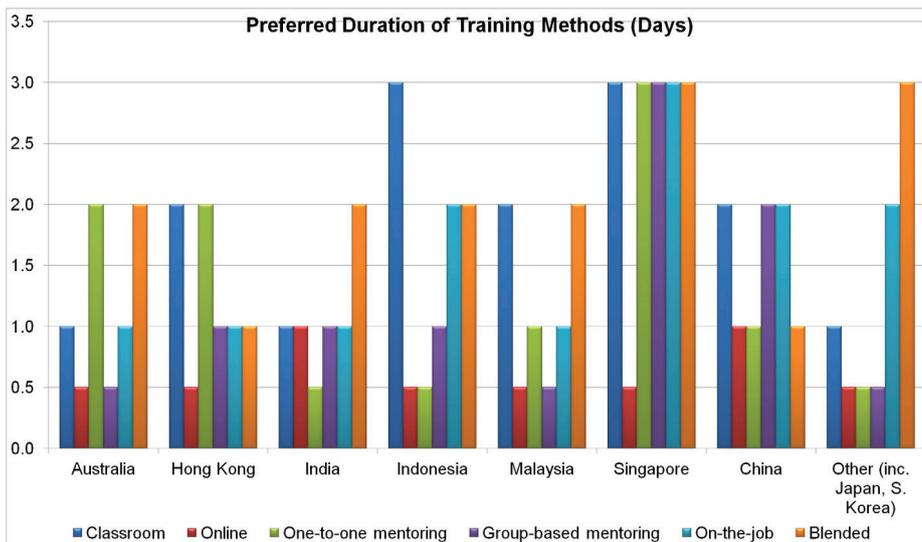


Figure 26

Clearly, there is less of a focus on the small 'byte' sized chunks that can fit around everyday work activities in Asia Pacific as there is in Europe.

9. Who Provides Information on Training?

This survey also explored in detail the often complex relationship between learners and the HR/L&D departments which often supply the training. In order to tackle this question the survey looked at who learners go to for information on training (figure 27).

9.1 Managers – The Greatest Source of Training Information

Looking at Asia Pacific as a whole, managers and colleagues were found to be the greatest source of information for training (31% of respondents), followed by the HR/L&D function (28%) and company intranets (17%). External organisations and governments were significantly lower.

What does this tell us? The fact that less than one in three employees go to their HR and L&D departments for information on training is an indication of a potential marginalisation of such departments.

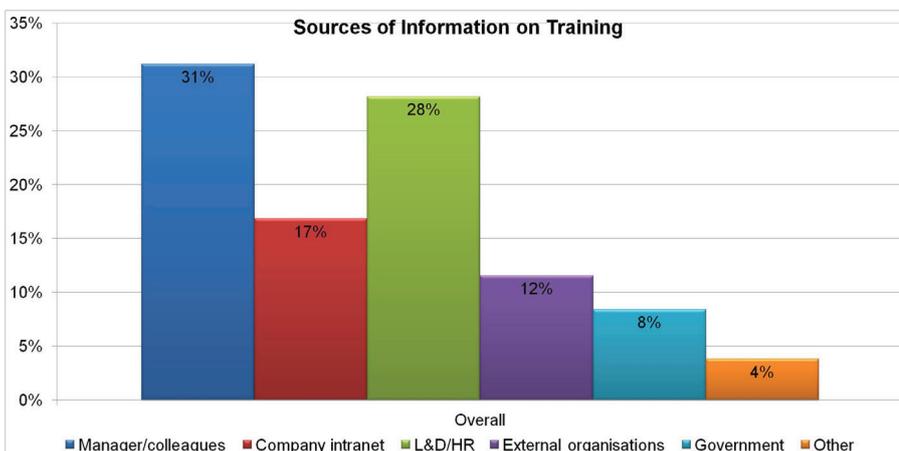


Figure 27

How is Training Delivered – Delivery Vehicle & Duration

- Laptops and desktops lead the way being used by 41% of learners followed by tablets at 28% and smart phones at 15%.
- India is the greatest user of smart phones for learning at 22% although Hong Kong and Indonesia are closely behind.
- Chinese employees are continuing to rely on laptops and desktops (78%) with a minimal embracing of new technologies to date. However, the country penetration of smart phones and tablets show that this is likely to change. Is HR/L&D a potential roadblock?

9.2 HR Departments – More Prevalent in Indonesia and China; Less so in Hong Kong, Singapore and India

Comparing countries (figure 28), it was interesting to note the role of the HR/L&D function.

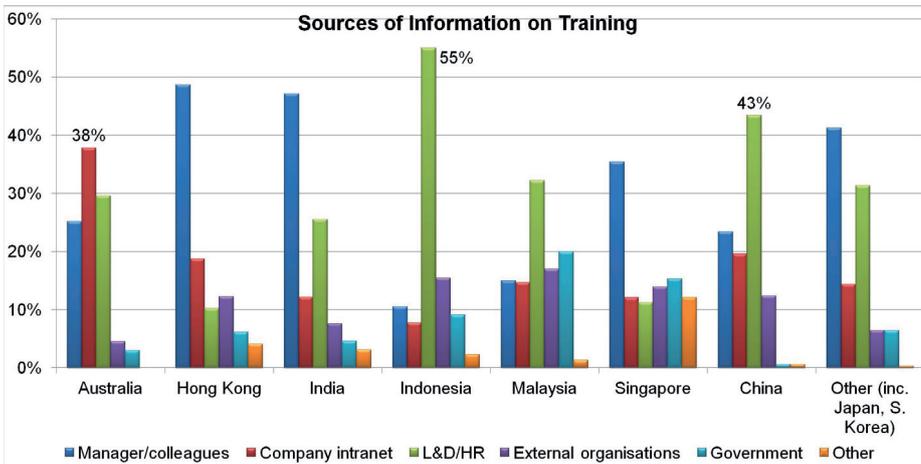


Figure 28

55% of respondents in Indonesia received information on training from the HR/L&D function followed by 43% in China and just over 30% in Malaysia. At the lower end of the scale, it should be noted that in Hong Kong (10%), Singapore (11%) and, as has been the theme throughout this survey – India (25%), the HR/L&D function had a much less significant role to play.

In India, for example, whereas 47% of learners went to managers for training information, only 25% went to L&D/HR. The fact that only one in ten learners in either Hong Kong or Singapore go to the HR/L&D function for training information also illustrates the marginal role HR/L&D departments have in a number of Asian Pacific countries.

Bucking the trend towards managers and L&D/HR as the principal providers of information, in Australia 38% used the company intranet as a source of information although this high figure was not replicated in other countries. China was second with 20% accessing the intranet for information and Hong Kong third with 19%.

10. What Are The Levels of Satisfaction with Training?

So how satisfied are Asian Pacific learners with current training methods?

10.1 Asian Pacific Learners 'Relatively Satisfied' With Their Training

The overall results found Asian Pacific learners to be relatively satisfied with the training methods they are using – scores ranging between 3.64 for online learning and 4.25 for blended learning out of a possible 6 (figure 29). While not 'earth shattering', it demonstrates that training is making an impact.



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Who Provides Information on Training?

- Managers and colleagues were found to be the greatest source of information for training (31% of respondents), followed by the HR/L&D function (28%) and company intranets (17%).
- Only one in ten learners in either Hong Kong or Singapore go to the HR/L&D function for training information.

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This relatively lukewarm response, however, is in sharp contrast to Europe where the Cegos 2012 European L&D survey found greater levels of satisfaction among European learners with 93% satisfied with the courses they have taken and 36% reported to be 'very' satisfied. Figure 30 illustrates this as well as the leading country scores (the UK, France and Spain).



Figure 29

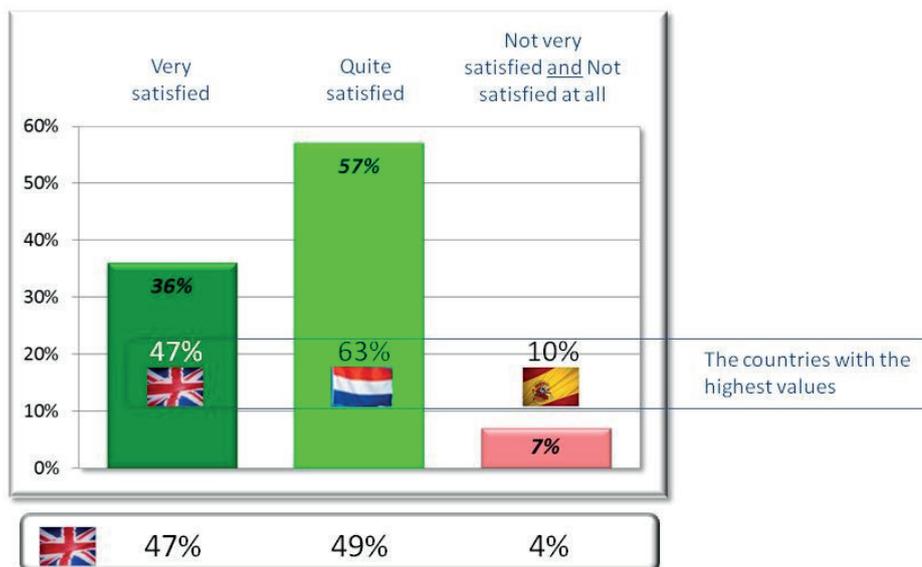


Figure 30

10.2 Chinese Learners Most Satisfied, Indonesians Least

Overall, when looking at the results by country (figure 31), the survey found Chinese learners to be the most satisfied with their training. Lower satisfaction rate scores included Indonesia for online learning with a score of 3, and Australia with a score of 3.1 for group-based mentoring/coaching.

Learners in Japan/South Korea and Malaysia were particularly satisfied with gaming while Australia had the highest satisfaction levels for virtual classrooms.

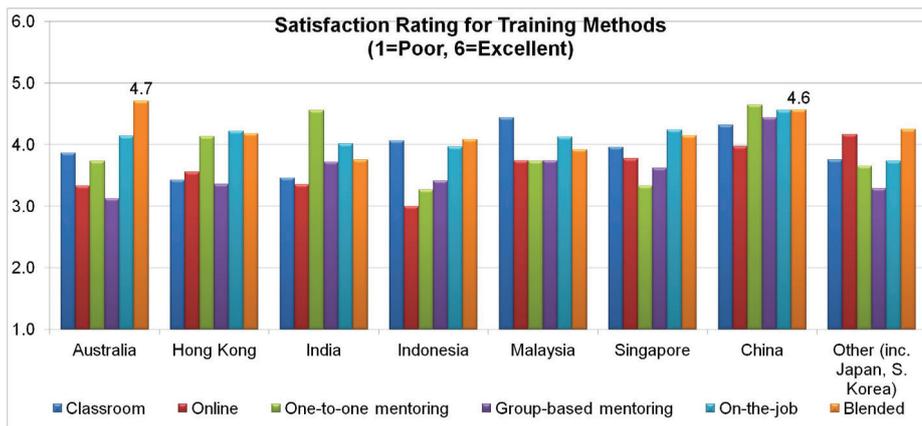


Figure 31

10.3 Japan/South Korea Leading the Way with Online Learning

Looking specifically at satisfaction ratings for online methods of learning (figure 32), again, respondents were found to be quite satisfied. Learners in Japan/South Korea and Malaysia were particularly satisfied with gaming rating them with a 5.0 out of a possible 6 and 4.5 respectively, while Australia had the highest satisfaction levels for virtual classrooms (4.5).

On the flip side, however, there were poor levels of satisfaction towards virtual classrooms in Indonesia and Hong Kong and e-learning modules in Malaysia. Clearly, there remains work to do on the part of both organisations and online external providers to meet learner needs.

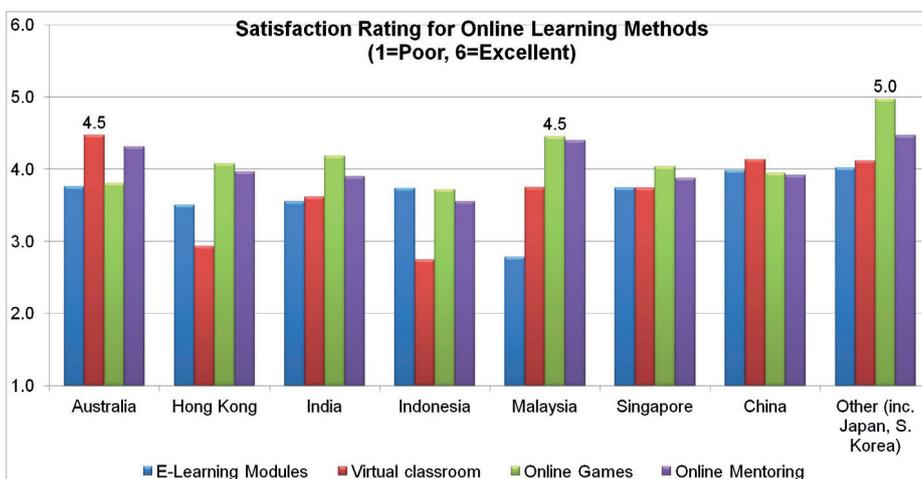


Figure 32

What Are the Levels of Satisfaction with Training?

- The overall results found Asian learners to be relatively satisfied with the training methods they are using – scores ranging between 3.64 for online learning and 4.25 for blended learning out of a possible 6.
- The results found Chinese learners to be the most satisfied with their training. Lower satisfaction rate scores included Indonesia for online learning with a score of 3, and Australia/New Zealand with a score of 3.1 for group-based mentoring/coaching

11. What Are The Levels of Satisfaction with the HR & L&D Departments?

The final part of the survey looked explicitly at the levels of satisfaction with HR & L&D Departments.

11.1 Are HR and L&D Departments Up to the Job?

Respondents were asked their opinions with regard to how effectively their companies (and HRD/L&D and Line Managers) involve themselves in training (figure 33).

As one can see, respondents rate their training provision from companies with marks in the high '3's with companies' 'ability to inform learners of training opportunities' coming in at 3.9 followed by 'identifying skills I need for my role and helping me understand my changing job requirements' at 3.8. While these are not highly negative results, they can only be described as lukewarm.



Figure 33

This identity and confidence crisis in HR and L&D is also reflected in global data. For example in a recent survey by global talent management provider, Lumesse, of 769 HR professionals globally across Asia Pacific, more than a third felt they are not able to prepare their workforce for the future. It is this impression that today's HR and L&D departments are 'out of their depth' and are unable to meet learner needs that is one of the most significant challenges for Asia Pacific's training development in the future.

Even more worryingly from this Lumesse survey, more than 70% of HR respondents said they believed employees considered HR to provide little or no learning and just the basic skills to help them succeed and another 40% of HR leaders felt employees would not approach them for help should they need to develop new knowledge or skills quickly.

11.2 India – A Lack of Confidence in HR but China Most Satisfied

There are number of clear differentiations among countries as illustrated in figure 34.

Indian employees, for example, post the lowest scores in all categories – well below the Asian Pacific average and reaffirming the idea that there is growing



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The Growing Gap

- Evidence of a growing gap between Learning professionals and the Learner community itself?



disconnect in India between employees and employers with Indian employers failing to meet the expectations of their workforce.

Chinese learners are the most satisfied with respondents giving the highest scores for how companies help employees to identify the skills they need for their role, now and in the future; for allowing employees to express their training expectations; for charting employees training for career progression; informing employees of training courses that they could attend; and providing tools to monitor employees career achievements after their training.



Figure 34

Considering that it is only over the last year or two that Chinese learning has focused more on business and management skills, this represents a significant 'sea change'.

In terms of other countries, there is not a great deal to choose between them with Malaysia and Australia behind China as the countries receiving the highest average scores across the board.

12. Conclusions

What this survey provides is a rich source of material about learning trends in Asia Pacific as well as a series of all-important questions. For example:

- Will we see an even more active role from the Asian Pacific employee in activating and designing training?
- Can HR & L&D departments rise to the challenge in providing the training an increasingly vocal set of Asian Pacific learners require?
- Will we see an even bigger explosion of mobile learning with the infrastructure for future growth clearly there?
- Will we see more blended learning in countries as training markets mature?
- And what of the future of specific countries? Will Indian employee find the training they are looking for? Will China's embracing of learning and technologies meet its huge potential? And will Singapore's training finally start to match its standing as one of the world's most advanced economies?

What is clear is that the Asian Pacific training sector remains one of the most interesting and fast moving in the world. With our 2012 survey having set a marker, we look forward to tracking future learning trends over the coming years.



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The Learner Community of 2013 and Beyond across APAC

- Learning and development across Asia Pacific is on a roll, and we expect to see more focus, more engagement and a more empowered Learner community into 2013 and beyond



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14. Our Thanks

A study of this magnitude could not have been completed without the hard work, effort and dedication of our colleagues and friends. Cegos would like to thank all those taking part in these efforts:

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Dr. TAN Bee Wan, CEO, ILC



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- Alexandra and Jerome from Cegos France for their support and advice along the way.



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15. About Cegos Group

Cegos, Europe's largest training organisation, has its Asia Pacific HQ in Singapore as a recognized hub for excellence within the L&D industry. The business is led by Managing Director, Jeremy Blain, who is in charge of strategic and operational activities for this region.

The Cegos Group was founded in 1926 in France, and is one of the world leaders in professional training for managers and their teams. In 2011, the Cegos Group achieved a turnover of \$SGD300 million and trained more than 200,000 managers internationally.

The Cegos Singapore hub adds to its existing operations in China and Hong Kong and gives an extra dimension to Cegos services by making it more accessible to clients across Asia Pacific. Cegos is one of the few global organisations able to support organisations in their international training and development initiatives.

The Cegos 'Think Global, Learn Local' philosophy is demonstrated by a robust and localised offer in Diagnostics, Blended learning, Face-to-face and e-learning; including a substantial portfolio of learning solutions in Mandarin.

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16. About Jeremy Blain

Jeremy Blain is Managing Director for Cegos Asia Pacific, where he heads up Cegos Region-wide operations and activities from the company's Singapore hub spanning India in the West to Japan and Oceania in the East.

Prior to this, Jeremy was responsible for the Cegos strategy for international expansion through a value adding Global Distribution Partners Network.

An L&D entrepreneur responsible for growing Cegos' business worldwide through his various roles within the company, Jeremy has over 11 years' experience in the industry as a managing director, partner, trainer, coach and program 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.

As one of Cegos' senior executives, 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://sg.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 through Jeremy's profile on LinkedIn, and include:

- Communities of Practice and application to organisations everywhere, May 2012
- Blended Learning and its Applications for Asian Companies Today, March 2012
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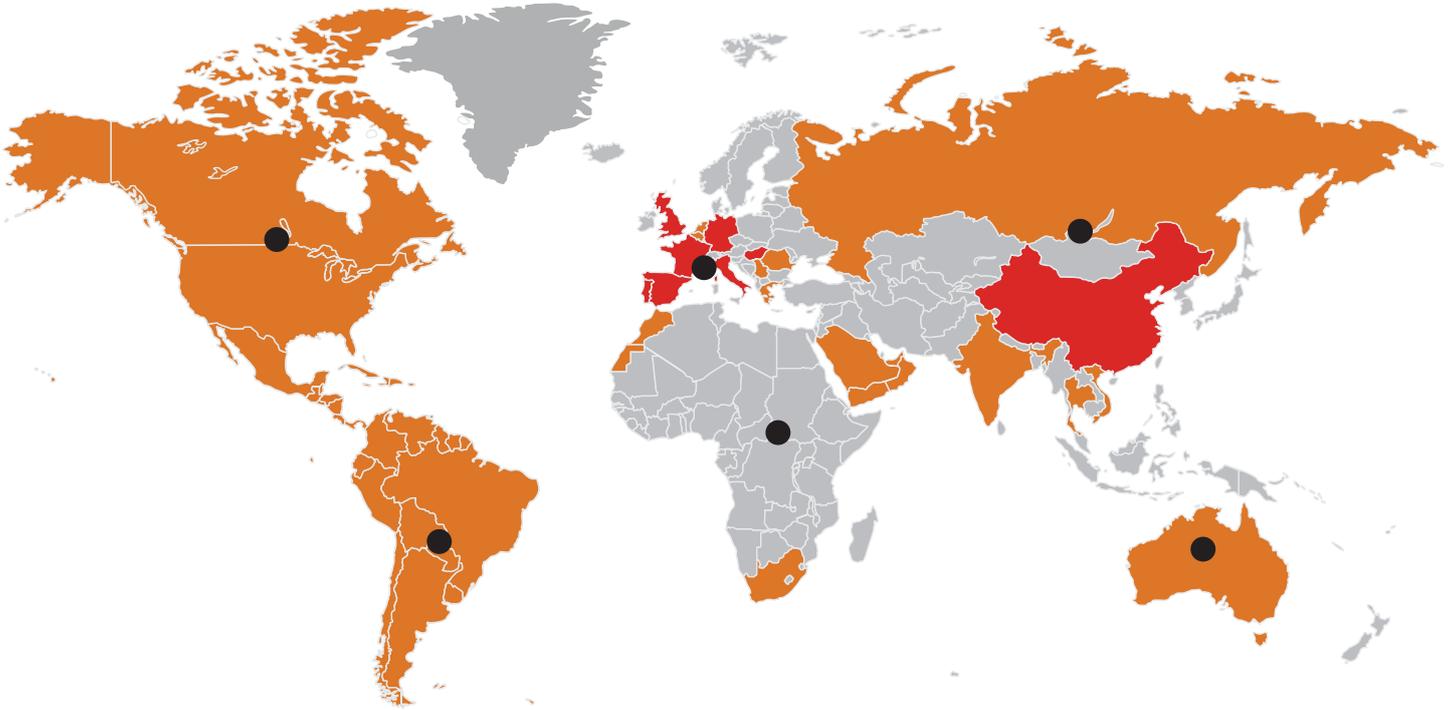


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