

Sectoral Human Capital Study II

Personal Development Sector

Selected results from II
edition of the study



About the study



Project name:

Sectoral Human Capital Study II
Personal Development Sector – 2nd edition *



Study objective

To increase the knowledge about the current and future demand for skills in the personal development sector



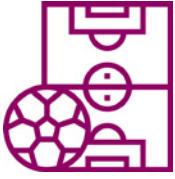
Research dates

2nd edition of the study:
January 2022 – June 2023,
including quantitative research:
January-February 2023

* The first edition of the survey was implemented in November 2020 – November 2021. The report from the 1st edition of the survey is available on the PARP website.

About the sector

The personal development sector includes:



out-of-school forms of sports and leisure education



learning of foreign language



out-of-school forms of cultural education



other out-of-school forms of education, not elsewhere classified



out-of-school forms of driving education

Personal development sector:



more than 89 000 registered business entities



highly fragmented sector, dominated by sole proprietorships

Source: National economy entities registered in the REGON register, declaring their activity, by provinces and PKD 2007, 2022.

Key job positions



Trainer



E-learning methodologist



Personal coach



E-learning content developer



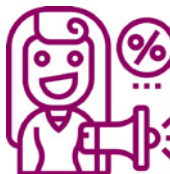
Driving instructor



Development service organisation coordinator



Instructor



Sales and marketing specialist



Lecturer

The sector is strongly influenced by socio-cultural, technological and economic trends

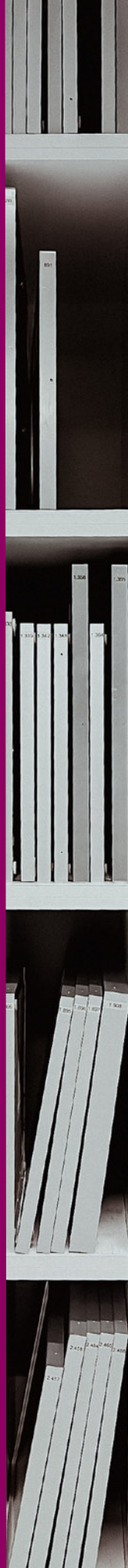
- ⚡ **the ageing of the society and decreasing participation in the labour market of economically active people** → challenges related to gaining knowledge about the determinants of the learning of seniors and the offer and model of services for this group

- ⚡ **the emergence of a new paradigm and learning environment (Personal Learning Environment)** → the growing importance of tasks and competences related to diagnosing the needs of learners, integrating educational innovations into development services, conducting evaluation, validation of learning outcomes

- ⚡ **progressing hyper-specialisation and increased demand for interdisciplinarity and hyper-specialisation** → increase in the importance of lifelong learning in the sector and possession of highly specialised competences resulting from the combination of advanced knowledge and skills coming from various areas

- ⚡ **the spread of means of remote communication** → the increasing importance of digital competences

- ⚡ **advancement of robotisation and automation** → the growing role of competences thanks to which the "educator" knows and understands the operation of new technological solutions and is able to apply them accurately



Implications of the trends' impact on the sector

Sector needs to change its business model taking into account:



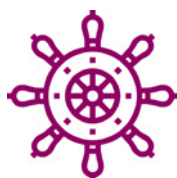
the development of a highly specialised and personalised offer



the application of new technologies in the educating process



investment in the development of staff competence and innovation



adequate response to identified trends and directions of change determining the competitive advantages of personal development services enterprises

Sector facing trends and challenges

Many employers do not recognise the impact of trends on their business.

Percentage of employers perceiving an impact of trends on their business

61%
the spread of remote forms of learning and service delivery

54%
the spread of new concepts and forms of development, including new learning environments

52%
increase in importance of evaluation, validation of learning outcomes and certification

46%
extending the educational offer for seniors and adapting educational methods to this client group

44%
advancement of hyper-specialisation

42%
the use of computerisation or digitalisation in the delivery of development services (e.g. artificial intelligence, machine learning, VR and AR technologies)

Source: own study – BBKL II personal development services sector (employers N=800) – II edition 2023.

Planned investment in employees' skills due to the impact of trends on the sector

62% of employers plan to invest in employee skills in the next 3 years in a minimum of one area related to expected sector changes

Most employers plan to invest in remote forms of learning, the fewest in specialised skills and skills related to digitisation:

45% popularisation of remote forms of learning and online service delivery

41% increased importance of evaluation, validation of learning outcomes and certification of the development service

41% popularisation of new concepts and forms of development support, including new learning environments

39% extending the educational offer for seniors and adapting educational methods to this client group

28% use of computerisation or digitisation in the delivery of development services (e.g. artificial intelligence, machine learning, VR and AR technologies)

26% progress of hiper-specialisation

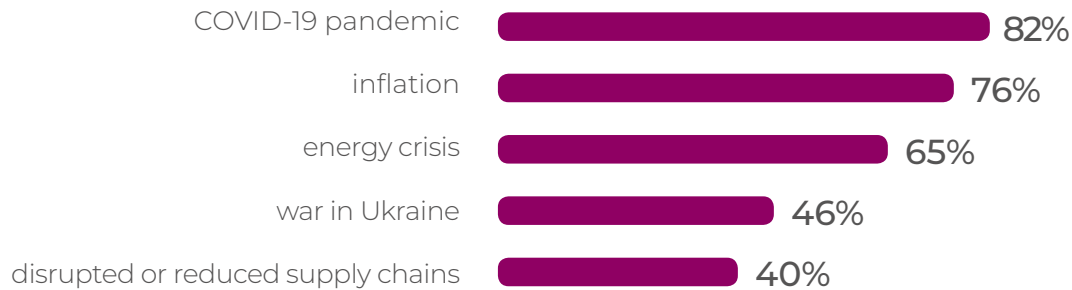
Source: own study – BBKL II personal development services sector (employers N=800) – II edition 2023.



Despite the fact that half of companies are not well prepared to use the potential of digitalisation, only a few companies intend to invest in competence in this area.

Challenges in the sector

Impact of various domestic and global events on personal development services in 2022 according to employers*



* high or medium impact

Source: own study – BBKL II personal development services sector (employers N=800) – II edition 2023.

Strategic areas for company development in the next 3 years according to employers

- » increase in average sales margin (22%)
- » creating or introducing new innovative services/ products/ processes/ work methods (17%)
- » investing or increasing investment in new technologies, modern software (11%)
- » investing or increasing investment in employee skills development (training, postgraduate studies, workplace learning) (8%)
- » modification of the company's business model (5%)
- » involvement or increased involvement in co-operation with schools or universities in order to educate and acquire future employees (3%)
- » hiring employees from abroad (2%)

Source: own study – BBKL II personal development services sector (employers N=800) – II edition 2023.

Investment in innovation is not a priority for companies in the sector



63%

of companies performed innovation in the 12 months preceding the survey – most often it involved the introduction of **a new or improved product or service (41%)**. The remaining companies did not decide on such activity most often due to **limited financial resources (42%)**, which are the **main barrier to the pursuit of innovative activities**.



The **innovative activity** of companies in the sector is **imitative/reproductive** and involves **copying solutions available on the market as well as compilation**.



17%

of companies in the sector plan **to invest in innovative activities over the next 3 years**.

Two speeds of investment in new development service solutions

Currently, the sector is primarily using simpler solutions focused on remote service delivery:



e-learning (increase in use **from 34% to 38%** compared to 2021),



blended learning (**27%** no change in use compared to 2021),



videolearning (major increase in use **from 13% to 27%** compared to 2021).

Along with the use of simpler solutions, the use of more advanced ones is also increasing:

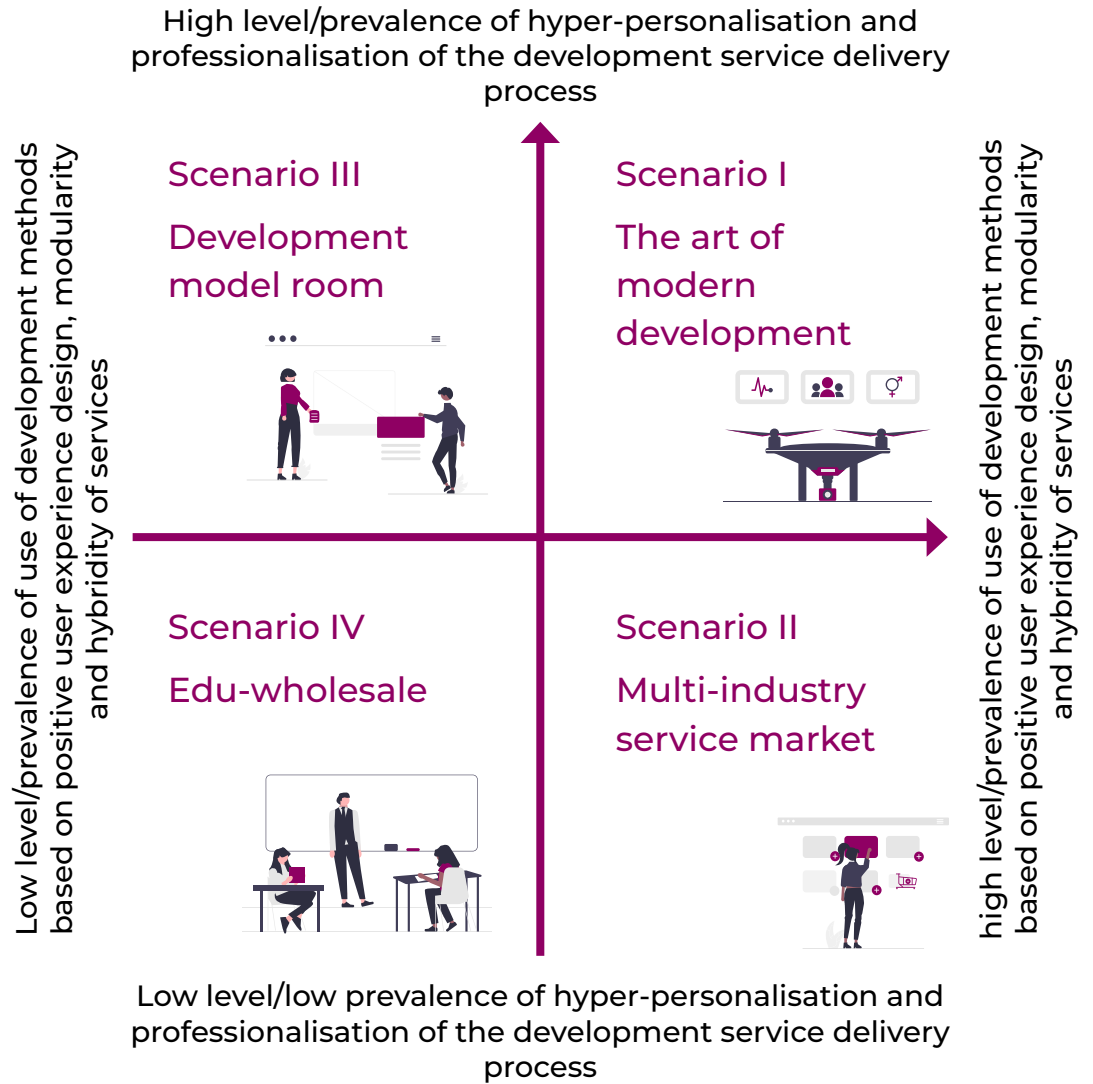


VR/ AR technologies (up **from 8% to 14%**) or artificial intelligence (up **from 2% to 15%**).

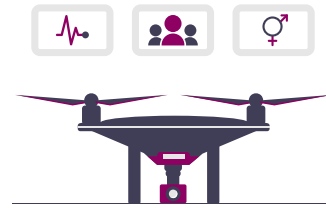
However, the use of these technologies is not widespread due to the high cost.

Source: own study – BBKL II personal development services sector (employers, 2023 N=800, 2021 N=800)

Future scenarios



Future scenarios



The art of modern development – Scenario I

The dynamic development of the sector based on the high prevalence of hyper-personalisation and professionalisation of the development service delivery process. **It manifests itself in the delivery of services that are maximally tailored to the different needs and learning styles of different groups of recipients through diagnosis, evaluation, validation and modularity.**

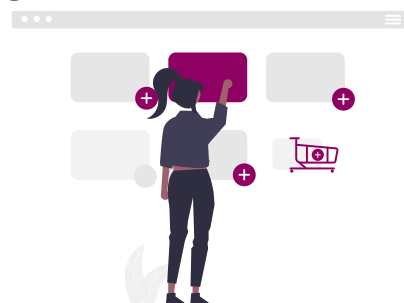
Increase in the use of development methods based on the design of positive recipient experiences, modularity and hybridity of services. It manifests itself in the implementation of services in mixed forms using UXD and other strictly relevant technologies, methods and techniques to support development. **A change in the status of robotisation and automation in development services is taking place.**

Multi-industry service market – Scenario II

The development in the area of the use of methods of personal development based on the design of positive recipient experiences, modularity and hybridity of services, with low prevalence of hyper-personalisation and professionalisation of the development service delivery process.

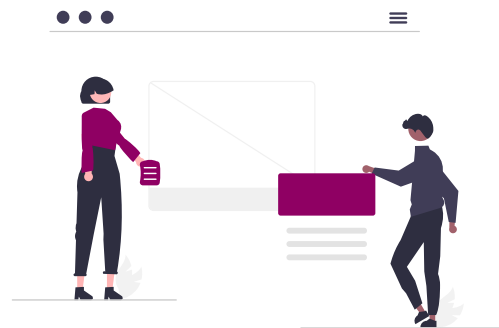
It is common in the sector **to design development services with modularity and deliver them in a hybrid model (remote and/or onsite).** The potential for robotisation and automation of development services is recognised.

Key competences - digital skills, skills related to the design of modular services that can be multiplied.



Development model room - Scenario III

Sector players build their competitive advantage by providing hyper-personalised, highly specialised development services in response to the (often unique) development needs of increasingly demanding clients.



Building competitive advantage through high quality development services and their 'tailor-made' nature.

Key competencies – in needs diagnosis, designing a learning situation taking into account the unique needs of the recipient, evaluation, validation of the service.

Edu-wholesale – Scenario IV

The sector delivers low quality development services. The offer of development services often does not respond to the specific needs of different groups of recipients and does not take into account their learning capabilities and preferences.



Competitive advantages are built on the basis of the price for a development service (regardless of its form: remote/stationary), which significantly limits the possibilities of ensuring the quality of development services.

Entrepreneurs in the personal development sector do not invest in improving the competencies of employees. Employees with higher competencies are leaving the sector due to lack of development opportunities, lack of tools to ensure the quality of services, limitations for the delivery of unique services.

Balance of competences

Balance of competences – a compilation of assessments of key competences for individual positions in the UR sector from the perspective of employers and employees, in order to better balance the labour market in terms of the supply of workers with relevant competences and the demand for them by employers. **Employers** in the quantitative survey referred to competencies in terms of:

- ★ the importance of the competency,
- ⬡ the difficulty of finding a person who has the specific competency needed for the position,
- 📈 prediction of how the importance of the competency will change over the next three years,
- 🔥 competences whose importance is already rapidly increasing or will increase most rapidly – *hot skills*.

Employees, assessed their own level of competences assigned to their position and their willingness to develop them.

The most **hard-to-find competences** were identified for **trainers and e-learning content developers**.



Two positions are dominated by growth competences in the next 3 years: lecturer and e-learning content developer.

The e-learning content developer not only has the most competences of a growth nature in a 3-year perspective, but also the most *hot skills* competences of all positions.

The universal hot skills competences were technological competences of varying scope depending on the position, e.g.:

- » the ability to actively seek out and incorporate new technological solutions into practice,
- » knowing the principles of digital tools and IT programmes supporting the learning process,
- » knowing the principles and ways to use Information and Communication Technology to support development,
- » be able to design a scenario for development services, including: exercises to be embedded in an e-learning platform,
- » knowing how new technologies work, e.g. artificial intelligence, VR/ AR technologies.

Only coaches, e-learning content developers and driving instructors plan to develop these competences.

Detailed balance of competences



Trainer

Employers:

- ★ **top-rated competences:** analytical competence, flexibility and proactivity, skills related to evaluation and validation, which is related to the trend of professionalisation of the sector.
- ⬡ **competences that are difficult to access:** skills related to trends affecting the sector (digitalisation, professionalisation), namely: proactively responding to the expectations and needs of the user, the ability to proactively seek out and incorporate new technological solutions into practice, the ability to conduct validation, the ability to learn, unlearn and re-learn.
- 💧 **hot skills:** the ability to validate learning outcomes and the ability to construct clear, precise messages, provide feedback, give developmental guidance, adapt the message to the recipient.
- 📈 **competences with growing importance in the next 3 years:** both social competences and evaluation and validation skills, as well as technological and sales competences.

Employees:

- ⬆️ **top-rated competences:** critical thinking, flexible handling of the development process, motivation and support of the recipient, analytical thinking, sharing responsibility for leading development activities.
- ⬇️ **lowest-rated competences:** familiarity with the operation of new technologies, e.g. artificial intelligence, VR/AR technologies, techniques and tools for promoting and/or selling services, learning, unlearning and re-learning, negotiating and contracting development service offers.



Personal coach

Employers:

- ★ **top-rated competences:** knowledge of trends, methods, models, techniques and tools of work, known behaviours, which are an indication to propose specialised support outside the area of coaching, as well as definitions of coaching, ethical and competence standards and skills related to evaluation and improvement of the service.
- ⚙️ **competence which is difficult to access** – ability to develop the client's awareness, inspire to recognise client's potential.
- 🔥 **hot skills:** ability to develop the client's awareness, but also related to technological developments – especially the ability to find and put into practice, as well as skills related to the effectiveness of the coaching.
- 📈 **competences with growing importance in the next 3 years:** competences related to pro-activeness in the coaching process, technological, as well as skills related to the evaluation and validation of learning outcomes and rapid adaptation to change, including the ability to follow trends, demonstrate creativity, analytical thinking.

Employees:

- ⬆️ **top-rated competences:** ability to define coaching objectives and expected outcomes and to select indicators for their achievement, proactivity, demonstrating a supportive and accepting attitude, showing respect towards the client, knowing the objectives and the application of evaluation and methods for their performance, cooperating with those involved in the coaching process, being co-responsible for carrying out development activities.
- ⬇️ **lowest-rated competences:** familiarity with the operation of new technologies, e.g. artificial intelligence, VR/ AR technologies, familiarity with the processes of offering, negotiating and concluding contracts, familiarity with techniques and tools for promoting and/ or selling services, use of supervision to improve skills and knowledge.

Driving instructor



Employers:

★ **top-rated competences:** knowledge of the rules of the course and of road traffic regulations, of the construction and operation of a vehicle or of the ability to assess risks to health and life and to take preventive action.

⚙️ **no difficult to find competences.**

🔥 **hot skills:** knowledge of the regulations on continuing education courses, competence in first aid, knowledge of the basics of the operation and use of electric cars, and the ability to actively seek out and incorporate new technological developments into practice. **These are at the same competences with growing importance in the next 3 years.**

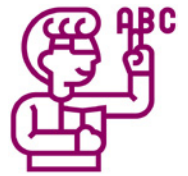
📈 Other **competences with growing importance in the next 3 years:** skills related to following trends, the ability to adapt quickly to change, the ability to proactively seek out and incorporate new technological solutions into practice, the ability to learn, unlearn and re-learn.

Employees:





⬆️ **top-rated competences:** knowledge of driving techniques, ability to follow the course syllabus as defined by the current regulations, preparation of the vehicle for use during training and/or the test, being alert and composed in emergency/ non-standard situations, having good reflexes, ability to prepare the course documentation.

⬇️ **lowest-rated competences:** familiarity with the operation of new technologies, e.g. artificial intelligence, VR/ AR technologies, guided by principles in line with professional ethics and sector regulations, learning, unlearning and re-learning.



Instructor



Employers:

- 
top-rated competences: related to work organisation and collaboration, the ability to set and establish specific learning objectives with participants, knowledge of terminology related to the field to which the course/ activity/ training and skills related to evaluation and verification of the quality of the development service.
- 
competences that are difficult to access: ability to proactively seek out and incorporate new technological solutions into practice, and the ability to learn, unlearn and re-learn. **These are at the same time hot skills with growing importance in the next 3 years.**
- 
hot skills: construct precise messages and instructions, know how to give learners feedback and guidance, and know the aims and uses of evaluation and its methods.
- 
competences with growing importance in the next 3 years: sales skills, technology application skills, as well as the ability to follow trends and seek information on new and improved working methods and tools, learn, unlearn and relearn.

Employees:

- 
top-rated competences: knowledge of instructional methods and exercise techniques, knowledge of the specific training process, assessing and correcting own attitude and relations with participants in the course/ class/ training, taking responsibility for the results of own actions and for the equipment entrusted to one's care, taking shared responsibility for conducting development activities and their results.
- 
lowest-rated competences: knowledge of the operation of new technologies, e.g. artificial intelligence, VR/AR technologies, ability to present, negotiate and/or contract the terms of sale of services, knowledge of techniques and tools for promoting and/or selling services, ability to learn, unlearn and re-learn.

Lecturer



Employers:

★ **top-rated competences:** knowledge of the foreign language of the education subject at C1, C2 level, the ability to adapt the methodology and technique of the courses/classes to the participants and to the form of the courses/classes), and, knowledge of methods and techniques of teaching, including in remote form, and original methods of teaching.

⚙️ **no difficult to find competences.**

🔥 **hot skills:** digital and technological skills (knowledge of the principles of digital tools and IT programmes supporting the learning process), as well as the ability to follow trends and seek information on new and improved working methods, techniques and tools. **These are at the same time competences with growing importance in the next 3 years.**

📈 **competences with growing importance in the next 3 years:** both job-specific competences, such as the ability to deliver courses according to the programme, but also skills in researching customer needs, conducting service evaluations and making recommendations for improvement, social competences and professional knowledge.

⚠️ **competencies at risk of shortage:** related to knowledge of the operation of new technologies, digital tools and IT programmes supporting the learning process and the ability to learn, unlearn and re-learn.

Employees:

⬆️ **top-rated competences:** knowledge of the foreign language subject of the course/ classes, both oral and written, at C1, C2 level, knowledge of professional ethics, knowledge of methods of recognising the needs of users for learning a foreign language, ability to create a positive image of the employer and of oneself, ability to be creative.

⬇️ **lowest-rated competences:** familiarity with the operation of new technologies, e.g. artificial intelligence, VR/AR technologies, knowledge of the principles of digital tools and IT programmes supporting the learning process, the ability to learn, unlearn and re-learn, the ability to follow trends and seek information on new and improved working methods, techniques and tools.

E-learning methodologist



Employers:

- ★ **top-rated competences:** demonstration of creativity, ability to collaborate and communicate with others, as well as technological/ digital skills (in particular the basic functionalities of software and other tools dedicated to the development of an e-learning service) and competences related to knowledge of standards, procedures (in particular – compliance with copyright law and professional ethics).
- ⬡ **competence which is difficult to access –** knowledge of the operation of new technologies, e.g. artificial intelligence, VR/ AR technologies.
- 🔥 **hot skills:** ability to design a scenario for development services, follow trends and know the principles and ways to use ICT to support development.

Employees:

- ⬆️ **top-rated competences:** ability to identify the development needs and expectations of the recipients of an e-learning service, adapting quickly to changes, designing the conception of the e-learning process, cooperating and communicating with those involved in the delivery of development services, following trends and seeking information on new and improved methods, techniques, tools of work.
- ⬇️ **lowest-rated competences:** basic principles of user experience design (UX), learning, unlearning and re-learning, operation of new technologies, e.g. artificial intelligence, VR/ AR technologies, open attitude towards new solutions, methods and tools for supporting development and their popularisation.

E-learning content developer



Employers:

- ★ **top-rated competences:** the use of a foreign language to acquire new knowledge and information, as well as technological and social competences (creativity). **Some skills rated as key competences are also hot skills**, including: ability to program storylines, gamification elements, dialogues and advanced skills in the use of graphics, video and audio applications.
- ⬡ **competences that are difficult to access:** compliance with copyright law, quick adaptation to change and the ability to learn, unlearn and re-learn (the importance of this competence is growing rapidly).
- 📈 **most of competencies are competences with growing importance in the next 3 years, which indicates that e-learning content developer is a position of the future.**
- ⚠️ **competence at risk of shortage:** ability to learn, unlearn and relearn; **it's at the same time hot skills, with growing importance in the next 3 years, with difficult accessibility.**

Employees:

- ↑ **top-rated competences:** knowledge of the basic principles of e-learning, webinar and online or commercial meeting platforms, ability to adapt quickly to change, adherence to copyright regulations, ability to program screens and interactions in an e-learning development tool, ability to approach new solutions, programs and programming tools with openness.
- ↓ **lowest-rated competences:** proficiency in the use of content creation tools: authoring software, analytical thinking, advanced skills in the use of graphics, video and audio processing applications, knowledge of the psychological and social conditions of the learning process.

Development service organisation coordinator



Employers:

★ **top-rated competences:** soft skills (being self-motivated and persistent in difficult/ emergency situations – taking the initiative to act in accordance with established procedures), as well as skills in the field of evaluation, verification of results and basic knowledge of the issues covered by the development service – **at the same time, it is the only competence with rapidly growing importance – hot skills.**

⬡ **no difficult to find competences.**

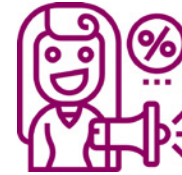
📈 **competences with growing importance in the next 3 years:** knowledge of the expectations, needs and external environment of the UR recipient, ability to plan and coordinate own work and that of the team, taking into account the timetable and budget, ability to adapt quickly to change, ability to plan the organisation of development services from a logistical point of view, both those provided in the digital environment and those provided on-site, ability to be creative, ability to evaluate services and make recommendations for improvement.

Employees:

⬆️ **top-rated competences:** knowledge of the aims and use of evaluation and its methods, ensuring that the quality of the service is maintained and that all recipients are satisfied, respecting data confidentiality, copyright and licensing laws.

⬇️ **lowest-rated competences:** knowledge of how to digitise and design content to facilitate the reception of the message, learning, unlearning and re-learning skills, knowledge of the expectations, needs and external environment of the recipient of development services.

Sales and marketing specialist



Employers:

- ★ **top-rated competences:** service management competences, i.e. the ability to update and use data collected in customer databases, as well as knowledge of the specifics of the development services offered or the ability to conduct social media activities in accordance with the principles of building a professional image.
- ⬡ **no difficult to find competences.**
- 🔥 **hot skills:** ability to diagnose development needs and reflect them in sales arguments and customer-facing offers, ability to listen actively, construct clear, precise and persuasive messages based on the real needs of customers using benefit and target language, knowledge of how new technologies work, e.g. artificial intelligence, VR/ AR technology.
- 📈 **competences with growing importance in the next 3 years:** hot skills and knowledge of marketing trends and principles of conducting promotional activities in traditional and online media, um. diagnosing development needs and reflecting them in commercial arguments, um. co-creating service offers based on the results of needs diagnosis, ability of creating educational and advertising content and conducting promotional activities on the website, quick to adapt to changes.

Employees:

- ⬆️ **top-rated competences:** ability to inform clients about new products on offer, using appropriate communication tools, being guided by principles of professional ethics and respect for competition, knowing the specificities of the development services on offer, being open to changes in the way things are done.
- ⬇️ **lowest-rated competences:** familiarity with the operation of new technologies, e.g. artificial intelligence, VR/ AR technologies, ability to learn, unlearn and re-learn, knowledge of how to digitise and design content to facilitate reception, basic knowledge of: cognitive, emotional and social determinants of adult learning.

Employment in the sector

16% of employers declared that their company was looking for employees for key positions in the 12 months preceding the survey.

The most frequently searched employees were:



lecturer (39%)



instructor (26%)

These are also the positions for which employers have found it most difficult to recruit in the last 12 months (34% and 23% respectively).

Demand for **e-learning content developers** has increased from 3% to 10%. This may indicate the growing importance of this professional role in the delivery of development services using remote communication tools, artificial intelligence and immersive technologies.

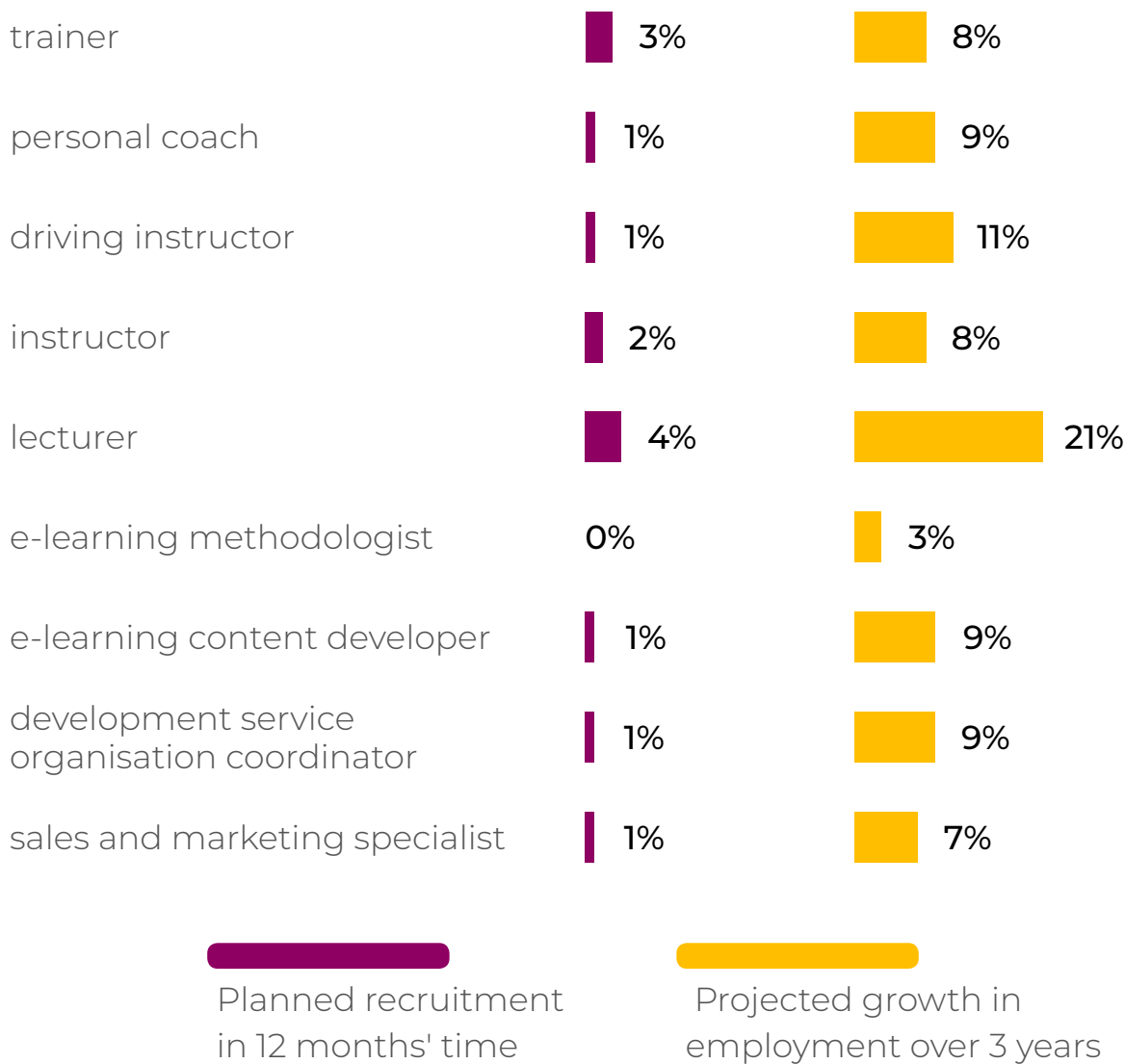
Reasons for recruitment difficulties:

- » low interest in the job offer (**54%**),
- » candidates who applied did not meet expectations (**31%**),
- » candidates who met expectations did not meet employment conditions (**24%**).

Projected changes in employment

19% of employers plan to hire for at least one key position in the next 12 months and **25%** predict an increase in hiring for key positions over a 3-year time horizon.

Projected changes in key positions over the next 12 months and 3 years






Source: own study – BBKL II personal development services sector (employers N=800) – II edition 2023.

Recruitment processes are dominated by a sieve model and a relatively low willingness to invest in staff competencies

The sector's hiring processes are dominated by a **sieve strategy (79%)** – between 2021 and 2023, an increase in the percentage of employers expecting job candidates to be fully prepared is noted – from **38%** to **51%**.

When there is a need for specific new skills within a company, employers primarily:

-  use the potential of their own employees by offering them **further training (48% vs. 59% in 2021)**,
-  **hire** and then train **new employees (19% vs. 12% in 2021)**,
-  **reorganise** the company in order to use better the existing skills of the employees (**21% vs. 12% in 2021**).

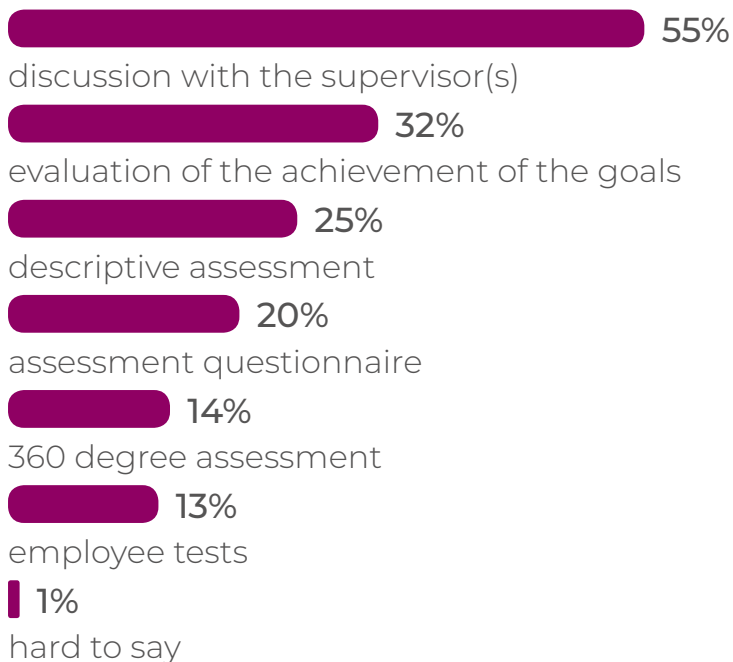


The percentage of companies not taking any action in a skills shortage situation increased from 8% to 19%.

Assessing the skills of employees

Less than half of employers assess the skills of their employees (41%). Despite this, the great majority of employers indicate that the skills of their employees are satisfactory (96%).

Assessing the skills of employees



Source: own study – BBKL II personal development services sector (employees assessed on their skills 2023 N=425) – II edition 2023.

Employers do not plan to invest in employee competence development in the next months

Only **21%** of employers plan to invest in staff skills development in the next 12 months, despite a number of development trends influencing the sector.

60% of employers considered the skills of their staff to be satisfactory and not in need of training.

Surveyed employees do not plan to develop their skills in the next months

78% of employees on key positions declare that they do not need additional development activities in order to perform well with their duties.

80% of employees on key positions indicate that they usually perform tasks at work that correspond to their skill level.

31% of employees on key positions plan to develop their competences in the next 12 months after the survey. Employees are primarily driven to develop further by improving the skills needed at work and the desire to develop their own skills (**51%** and **49%** respectively).

For a full overview of the
findings, see the Report:

Sectoral Human Capital Study II

Personal Development Sector

Report on the 2nd edition of the research:

 [https://www.parp.gov.pl/
component/site/site/bilans-kapitalu-
ludzkiego#wynikibadanbranzowych](https://www.parp.gov.pl/component/site/site/bilans-kapitalu-ludzkiego#wynikibadanbranzowych)