

Coping with Change?

*HOW SWISS ADULT EDUCATION PROVIDERS ADAPT TO
CURRENT CHALLENGES AT THE ORGANISATIONAL LEVEL*

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Fédération suisse pour la formation continue
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Swiss Federation for Adult Learning

Swiss Provider Survey 2022 (I/II)

- Online survey of approx. 2500 adult education providers (April to May 2022)
- N = 211
- Topics:
 - Dimensions of the adult education market
 - Economic situation
 - Demand
 - Supply
 - Staffing

Swiss Provider Survey 2022 (II/II)

- Topics:
 - Change on the organisational level:
 - organisational structures and processes
 - offer and programme planning
 - corporate strategies

Economic Situation of adult education providers in Switzerland

Wie beurteilen Sie die wirtschaftliche Situation Ihrer Einrichtung?

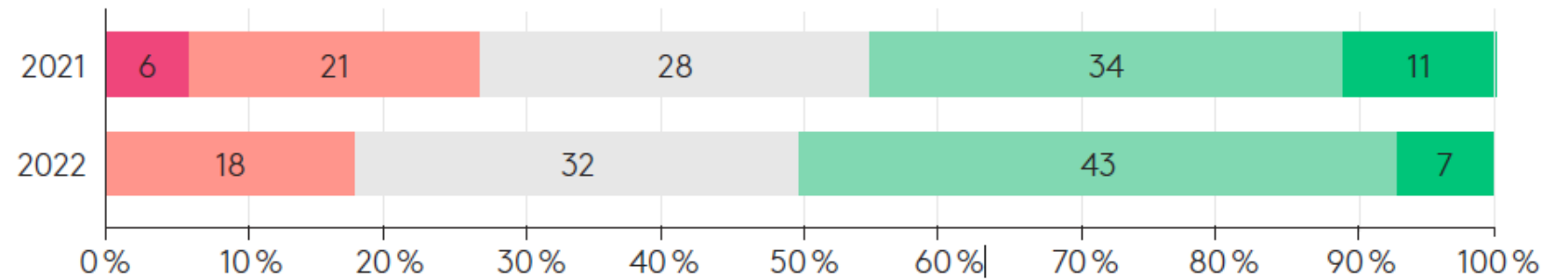


Abb. 2:
Einschätzung der wirtschaftlichen Situation.
(N=206–207, gerundete Prozentwerte)

sehr negativ Eher negativ Neutral Eher positiv Sehr positiv

Economic Situation of adult education providers in Switzerland

Wie schätzen Sie die Entwicklung der Nachfrage ein?

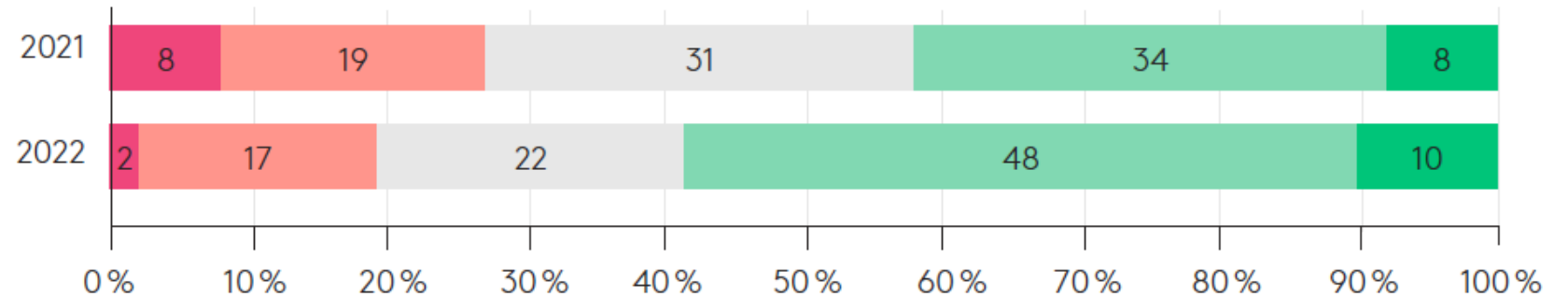


Abb. 5:
Einschätzung der Nachfrageentwicklung
(N=209, gerundete Prozentwerte)

sehr negativ Eher negativ Neutral Eher positiv Sehr positiv

Pressure at the organisational level is currently high

50-60% of the Swiss providers consider the pressure for change at the organisational level to be large to very large

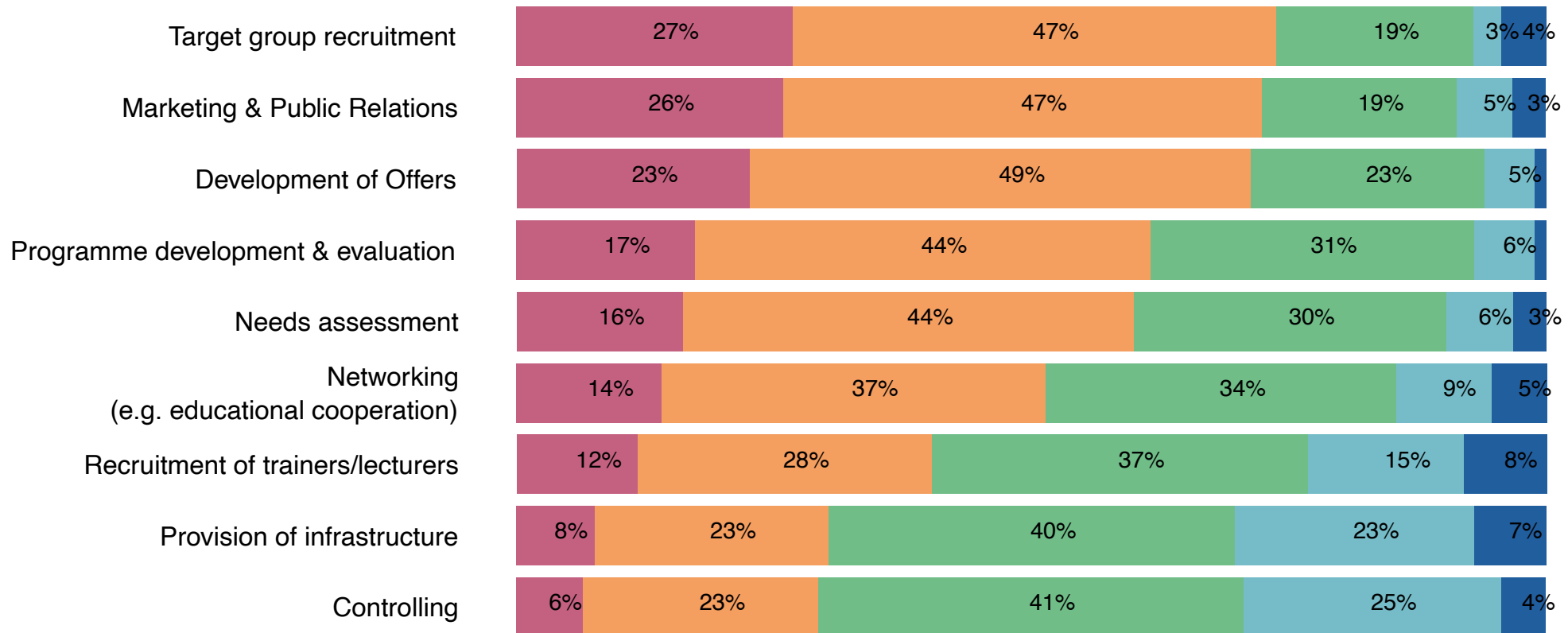
76% state that the pressure to change has increased due to the pandemic

Pressure for change is exerted primarily by the following **external factors**:

- Digitalisation (74%)
- Changing customer needs (70%)
- Changing demand (67%)
- Innovation pressure (63%)

Pressure in the area of offer and programme planning

How great do you consider the current pressure for change in the following areas of offer and programme planning?



■ very large
 ■ rather small
 ■ not existent
■ rather large
 ■ very small

A lot is changing at the organisational level

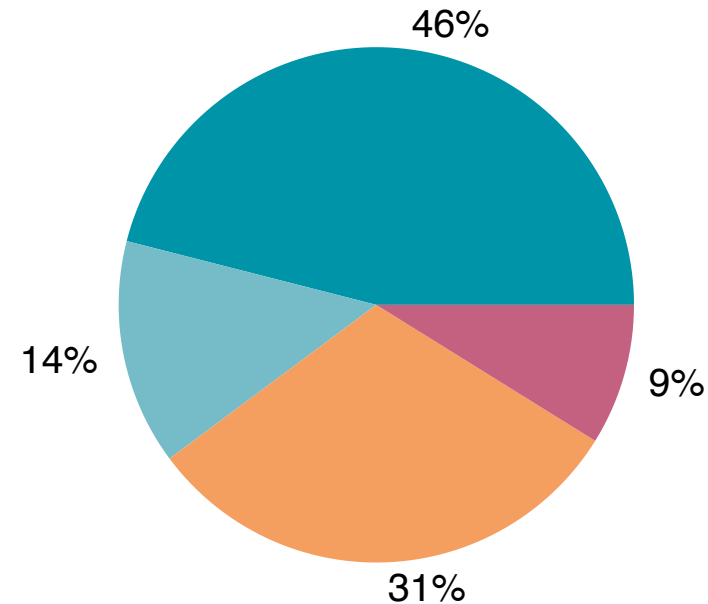
90% are making changes to organisational structures and processes.

80% are implementing changes in the area of offer and programme planning

54% are undertaking a strategic realignment

Scope of change

How extensive do you consider the currently implemented/planned changes to organisational structures and processes to be?



- Targeted optimisation: introduction of new tools, replacement of a management or specialist function
- Consistent realignment: creation of new processes and departments

- Comprehensive evolution: redistribution of tasks across departments
- Radical transformation: comprehensive restructuring of the overall organisation

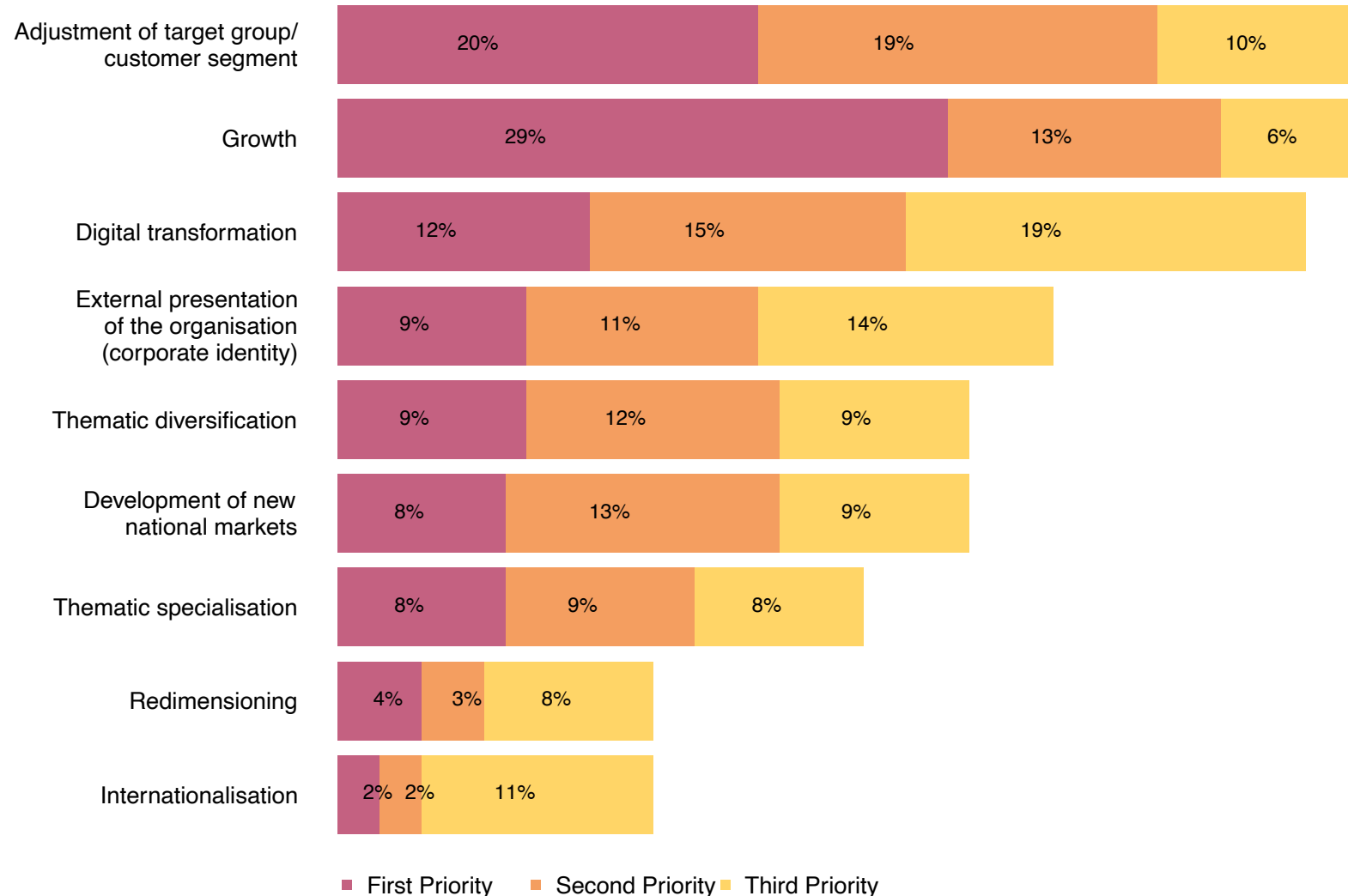
Goals of the structural adjustments

With what goal are changes in organisational structures and processes currently being implemented/planned?



Goals of the strategic adjustments

Which of the following goals are targeted by the strategic reorientation?



Conclusion I

Observation: Extremely difficult economic situation as a result of the Corona pandemic and slow recovery of demand

- Swiss adult education providers are currently focusing on increasing revenue and on growth
- Providers want to reach new target groups which requires intensive marketing measures and needs assessment, and thus investments

Conclusion II

Observation: Strong pressure for change on the organisational level due to changing demand and changing learning needs

- The development of innovative offers remains a priority
- Providers are trying to make their organisations more agile in order to be able to react more quickly to the constantly changing demand

However: Increasing competition does not seem to be a source of pressure for change

Conclusion III

Observation: One in two providers currently develop their organisation comprehensively or even transform it completely

- Around half of the providers are aiming for the digital transformation of the organisation
- For many, this goes hand in hand with a new organisational culture, which strengthens the autonomy of employees, but also requires a stronger identification with the organisation

Thank you for your attention!

- Publication of the results (in GER, FRA, ITA):
 - [SVEB-Branchenmonitor](#) (September 2022)
 - [FOCUS Weiterbildung](#) (November 2022)
- If you have any questions, please contact:
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