

# Top Expected Changes, By Industry, By Region, and By Org Size - Prosci 2023 Research Results

Top Expected Changes																		
<< Percent Identifying Expected Change Index Score: <1 means less than study average >>																		
Total Study	Health Care	Consulting	Government - Federal	Manufacturing	Government - State	Education Services	Finance	Insurance										
37%	29%	40%	41%	37%	39%	36%	44%	35%	Technology and digital transformation	0.79	1.08	1.10	0.99	1.05	0.98	1.17	0.95	1.00
10%	10%	7%	13%	5%	11%	7%	20%	17%	Regulatory changes and compliance	1.00	0.71	1.20	0.51	1.10	0.68	1.92	1.61	1.00
9%	1%	6%	6%	16%	5%	1%	4%	7%	Environmental sustainability and climate change	0.08	0.61	0.67	1.71	0.51	0.13	0.46	0.72	1.00
9%	14%	10%	8%	12%	11%	14%	6%	4%	Talent retention and turnover	1.58	1.11	0.90	1.33	1.29	1.52	0.72	0.47	1.00
9%	6%	11%	11%	8%	13%	14%	6%	8%	Cultural and organizational change	0.71	1.24	1.32	0.96	1.54	1.57	0.66	0.88	1.00
5%	2%	2%	3%	3%	4%	5%	9%	12%	Customer expectations	0.44	0.51	0.59	0.61	0.74	0.97	1.77	2.42	1.00
4%	24%	3%	3%	1%	3%	1%	0%	5%	Healthcare and medical advancements	5.95	0.81	0.84	0.15	0.74	0.29	-	1.24	1.00
4%	5%	7%	1%	4%	0%	2%	4%	6%	Mergers and acquisitions	1.24	1.74	0.15	1.10	-	0.47	1.14	1.56	1.00
4%	4%	0%	3%	3%	6%	6%	2%	0%	Budget constraints	1.19	-	0.78	0.81	1.66	1.62	0.59	-	1.00
3%	1%	2%	2%	7%	1%	3%	2%	2%	Economic changes	0.24	0.82	0.57	2.36	0.40	0.98	0.71	0.56	1.00
3%	1%	6%	5%	1%	4%	5%	1%	1%	Remote work and hybrid work environments	0.57	2.28	1.81	0.47	1.68	1.87	0.28	0.33	1.00
2%	1%	2%	3%	1%	1%	1%	1%	3%	Security and risk management	0.59	1.35	1.56	0.65	0.33	0.65	0.79	1.85	1.00

Top Expected Changes																		
<< Percent Identifying Expected Change Variance from Total Study Population >>																		
Total Study	United States	Europe	Australia and NZ	Canada	Latin America	Asia and Pacific I's	Africa	Middle East										
37%	35%	41%	29%	37%	39%	41%	37%	48%	Technology and digital transformation	0.94	1.11	0.79	1.00	1.04	1.10	0.99	1.29	1.00
10%	12%	8%	17%	8%	7%	8%	11%	10%	Regulatory changes and compliance	1.15	0.78	1.59	0.75	0.71	0.74	1.04	1.00	1.00
9%	7%	13%	12%	6%	10%	11%	8%	5%	Environmental sustainability and climate change	0.70	1.41	1.30	0.67	1.03	1.19	0.85	0.55	1.00
9%	11%	6%	9%	13%	6%	10%	8%	5%	Talent retention and turnover	1.26	0.64	1.02	1.44	0.71	1.16	0.90	0.59	1.00
9%	7%	7%	8%	9%	15%	7%	16%	8%	Cultural and organizational change	0.81	0.84	0.91	1.08	1.77	0.79	1.85	0.90	1.00
5%	5%	6%	5%	4%	4%	3%	4%	4%	Customer expectations	0.97	1.20	1.08	0.90	0.84	0.70	0.75	0.80	1.00
4%	6%	3%	4%	6%	2%	2%	1%	4%	Healthcare and medical advancements	1.53	0.62	0.93	1.38	0.55	0.42	0.36	0.96	1.00
4%	4%	5%	2%	2%	4%	6%	2%	5%	Mergers and acquisitions	1.16	1.22	0.46	0.50	1.08	1.59	0.58	1.38	1.00
4%	4%	4%	3%	3%	2%	3%	3%	5%	Budget constraints	1.14	1.11	0.96	0.94	0.51	0.71	0.80	1.43	1.00
3%	3%	2%	5%	3%	2%	5%	2%	0%	Economic changes	1.07	0.65	1.74	1.14	0.62	1.71	0.72	-	1.00
3%	3%	2%	3%	5%	3%	1%	2%	1%	Remote work and hybrid work environments	1.10	0.66	1.04	1.86	1.03	0.34	0.86	0.52	1.00
2%	2%	2%	2%	2%	0%	1%	2%	1%	Security and risk management	1.20	1.23	0.96	0.86	0.20	0.47	1.20	0.72	1.00

Top Expected Changes										
<< Percent Identifying Expected Change Variance from Total Study Population >>										
Total Study	Small <100	Mid 100-1000	Large 1K-10K	Enterprise >10K						
37%	32%	39%	35%	40%	Technology and digital transformation	0.87	1.04	0.94	1.07	1.00
10%	11%	12%	10%	9%	Regulatory changes and compliance	1.02	1.18	1.00	0.85	1.00
9%	6%	8%	11%	9%	Environmental sustainability and climate change	0.67	0.85	1.17	1.00	1.00
9%	9%	10%	9%	8%	Talent retention and turnover	1.03	1.12	0.98	0.94	1.00
9%	12%	8%	9%	8%	Cultural and organizational change	1.34	0.89	1.07	0.91	1.00
5%	4%	6%	4%	5%	Customer expectations	0.90	1.22	0.89	0.99	1.00
4%	3%	3%	4%	5%	Healthcare and medical advancements	0.83	0.80	0.91	1.33	1.00
4%	6%	3%	4%	4%	Mergers and acquisitions	1.66	0.82	0.94	1.07	1.00
4%	3%	3%	5%	3%	Budget constraints	0.93	0.81	1.34	0.71	1.00
3%	5%	3%	3%	2%	Economic changes	1.77	1.08	0.94	0.82	1.00
3%	2%	2%	2%	3%	Remote work and hybrid work environments	0.96	0.88	0.95	1.22	1.00
2%	2%	1%	2%	2%	Security and risk management	1.06	0.65	1.07	1.08	1.00

# Top Expected Changes, By Industry, By Region, and By Org Size - Prosci 2023 Research Results

Total Study	Health Care	Consulting	Government - Federal	Manufacturing	Government - State	Education Services	Finance	Insurance	Top Expected Changes	Health Care	Consulting	Government - Federal	Manufacturing	Government - State	Education Services	Finance	Insurance	Total Study
37%	29%	40%	41%	37%	39%	36%	44%	35%	<< Percent Identifying Expected Change Variance from Total Study Population >>	-8%	3%	4%	-1%	2%	-1%	6%	-2%	37%
10%	10%	7%	13%	5%	11%	7%	20%	17%	Technology and digital transformation	0%	-3%	2%	-5%	1%	-3%	10%	6%	10%
9%	1%	6%	6%	16%	5%	1%	4%	7%	Regulatory changes and compliance	-9%	-4%	-3%	7%	-5%	-8%	-5%	-3%	9%
9%	14%	10%	8%	12%	11%	14%	6%	4%	Environmental sustainability and climate change	5%	1%	-1%	3%	3%	5%	-2%	-5%	9%
9%	6%	11%	11%	8%	13%	14%	6%	8%	Talent retention and turnover	-3%	2%	3%	0%	5%	5%	-3%	-1%	9%
5%	2%	2%	3%	3%	4%	5%	9%	12%	Cultural and organizational change	-3%	-2%	-2%	-2%	-1%	0%	4%	7%	5%
4%	24%	3%	3%	1%	3%	1%	0%	5%	Customer expectations	20%	-1%	-1%	-3%	-1%	-3%	-4%	1%	4%
4%	5%	7%	1%	4%	0%	2%	4%	6%	Healthcare and medical advancements	1%	3%	-3%	0%	-4%	-2%	1%	2%	4%
4%	4%	0%	3%	3%	6%	6%	2%	0%	Mergers and acquisitions	1%	-4%	-1%	-1%	2%	2%	-1%	-4%	4%
3%	1%	2%	2%	7%	1%	3%	2%	2%	Budget constraints	-2%	-1%	-1%	4%	-2%	0%	-1%	-1%	3%
3%	1%	6%	5%	1%	4%	5%	1%	1%	Economic changes	-1%	3%	2%	-1%	2%	2%	-2%	-2%	3%
2%	1%	2%	3%	1%	1%	1%	1%	3%	Remote work and hybrid work environments	-1%	1%	1%	-1%	-1%	-1%	0%	2%	2%
									Security and risk management									

Total Study	United States	Europe	Australia and NZ	Canada	Latin America	Asia and Pacific I's	Africa	Middle East	Top Expected Changes	United States	Europe	Australia and NZ	Canada	Latin America	Asia and Pacific I's	Africa	Middle East	Total Study
37%	35%	41%	29%	37%	39%	41%	37%	48%	<< Percent Identifying Expected Change Variance from Total Study Population >>	-2%	4%	-8%	0%	1%	4%	0%	11%	37%
10%	12%	8%	17%	8%	7%	8%	11%	10%	Technology and digital transformation	2%	-2%	6%	-3%	-3%	-3%	0%	0%	10%
9%	7%	13%	12%	6%	10%	11%	8%	5%	Regulatory changes and compliance	-3%	4%	3%	-3%	0%	2%	-1%	-4%	9%
9%	11%	6%	9%	13%	6%	10%	8%	5%	Environmental sustainability and climate change	2%	-3%	0%	4%	-3%	1%	-1%	-4%	9%
9%	7%	7%	8%	9%	15%	7%	16%	8%	Talent retention and turnover	-2%	-1%	-1%	1%	7%	-2%	7%	-1%	9%
5%	5%	6%	5%	4%	4%	3%	4%	4%	Cultural and organizational change	0%	1%	0%	0%	-1%	-1%	-1%	-1%	5%
4%	6%	3%	4%	6%	2%	2%	1%	4%	Customer expectations	2%	-2%	0%	2%	-2%	-2%	-3%	0%	4%
4%	4%	5%	2%	2%	4%	6%	2%	5%	Healthcare and medical advancements	1%	1%	-2%	-2%	0%	2%	-2%	1%	4%
4%	4%	4%	3%	3%	2%	3%	3%	5%	Mergers and acquisitions	1%	0%	0%	0%	-2%	-1%	-1%	2%	4%
3%	3%	2%	5%	3%	2%	5%	2%	0%	Budget constraints	0%	-1%	2%	0%	-1%	2%	-1%	-3%	3%
3%	3%	2%	3%	5%	3%	1%	2%	1%	Economic changes	0%	-1%	0%	2%	0%	-2%	0%	-1%	3%
2%	2%	2%	2%	2%	0%	1%	2%	1%	Remote work and hybrid work environments	0%	0%	0%	0%	-1%	-1%	0%	-1%	2%
									Security and risk management									

Total Study	Small <100	Mid 100-1000	Large 1K-10K	Enterprise >10K	Top Expected Changes	Small <100	Mid 100-1000	Large 1K-10K	Enterprise >10K	Total Study
37%	32%	39%	35%	40%	<< Percent Identifying Expected Change Variance from Total Study Population >>	-5%	1%	-2%	3%	37%
10%	11%	12%	10%	9%	Technology and digital transformation	0%	2%	0%	-2%	10%
9%	6%	8%	11%	9%	Regulatory changes and compliance	-3%	-1%	2%	0%	9%
9%	9%	10%	9%	8%	Environmental sustainability and climate change	0%	1%	0%	-1%	9%
9%	12%	8%	9%	8%	Talent retention and turnover	3%	-1%	1%	-1%	9%
5%	4%	6%	4%	5%	Cultural and organizational change	-1%	1%	-1%	0%	5%
4%	3%	3%	4%	5%	Customer expectations	-1%	-1%	0%	1%	4%
4%	6%	3%	4%	4%	Healthcare and medical advancements	3%	-1%	0%	0%	4%
4%	3%	3%	5%	3%	Mergers and acquisitions	0%	-1%	1%	-1%	4%
3%	5%	3%	3%	2%	Budget constraints	2%	0%	0%	-1%	3%
3%	2%	2%	2%	3%	Economic changes	0%	0%	0%	1%	3%
2%	2%	1%	2%	2%	Remote work and hybrid work environments	0%	-1%	0%	0%	2%
					Security and risk management					