



# The Voice of our clients 2025

Trends and insights from 546 interviews

30/05/2025



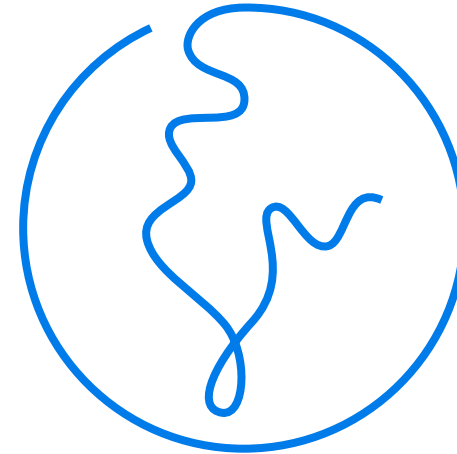
# Voice of our Clients: the Cegos 2025 qualitative survey

The aim was to interview our clients and identify key trends on the following topics:

- Their current skills development and training **challenges and pain points.**
- **The most critical skills or areas of knowledge** their employees need to develop in the next years.
- **Their current approach to employee training** and development.
- Their expectations from a **Learning and Development (L&D) partner.**

**We interviewed**

**546 HR and L&D professionals**



**across Asia, Europe and Latin America.**



# Summary

**01** Key trends

**02** Specific trends and challenges: geographies

**03** Specific trends and challenges: Industries

01

# Key trends

Subtitle



# Executive abstract: key conclusions

## **Clients want relevant training for their business context**

Training solutions must be framed as business answers, not as lists of course titles, and deliver real impact from day one.

## **Customization is expected, not optional**

Clients expect offers to be adapted to their industry, role, maturity, and business priorities.

## **Facilitators are critical to credibility**

Clients expect expert facilitators with real-world experience who connect with learners.

## **Co-creation is no longer a premium service**

Clients increasingly expect to build solutions with their providers.

## **Budget constraints exist but often hide deeper issues**

Even if budgets remain a constant concern, mindset, leadership buy-in, and culture are the real blockers.

## **The learning experience must feel modern**

Clients demand engaging, blended, and tech-supported experiences that motivate learners.

## **Innovation must be purposeful**

Clients value innovation that brings real business value, not just trends or buzzwords.

## **Impact must be visible from day one**

Clients expect clear business alignment, KPIs, and follow-up options to be embedded into every solution from the start.

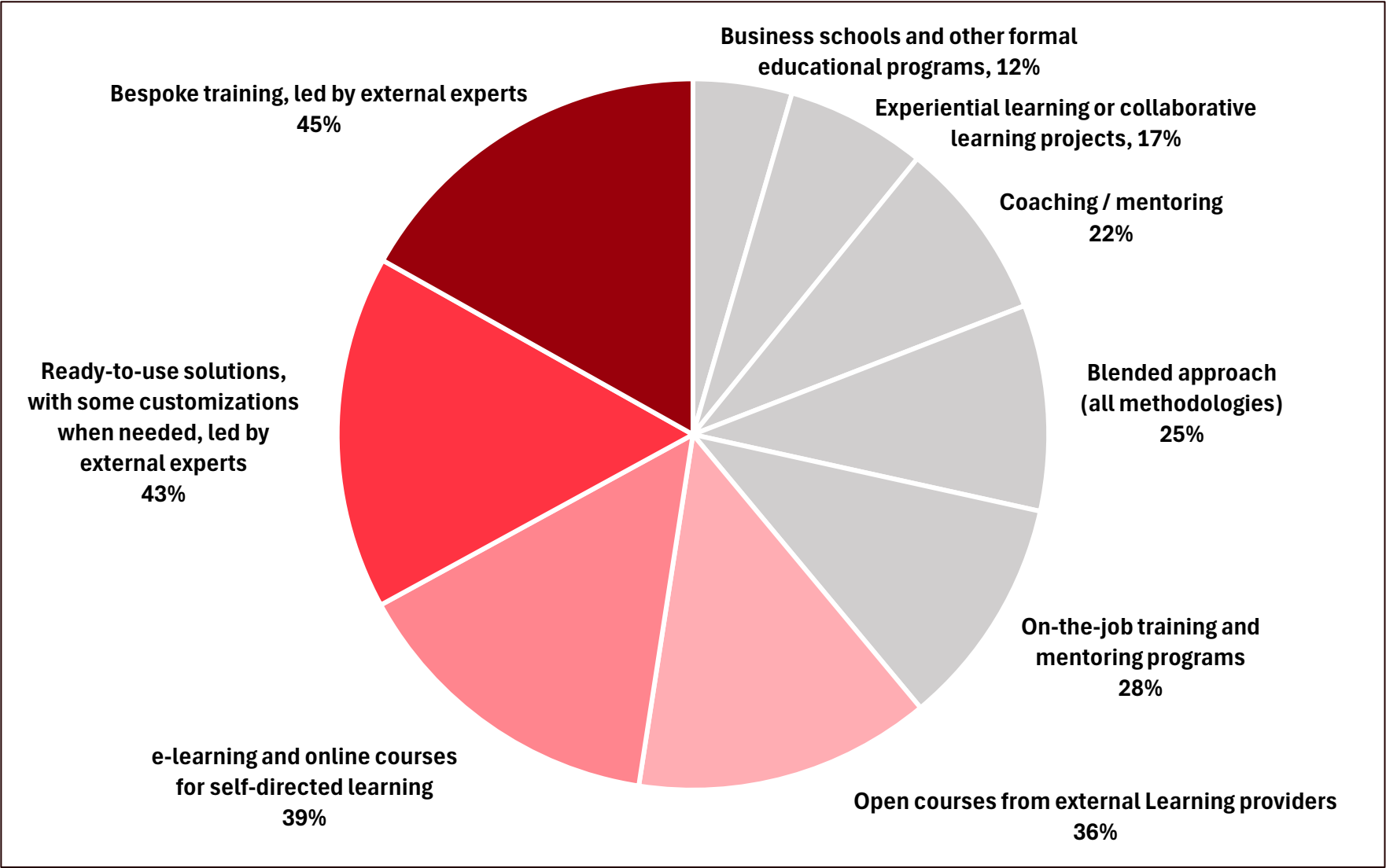
## **Transfer and follow-up are non-negotiable**

Training that stops at delivery is seen as incomplete. It must ensure learning transfer and measurable behavior change.

## **Clients seek strategic L&D partners, not vendors**

Clients expect providers to act as long-term partners who deeply understand their business and bring consultative support.

# How do you currently approach employee training and development?





## How do you currently approach employee training and development?

### **Customization is key to match diverse market needs**

Across survey options, customized solutions, whether through bespoke external training or adapted ready-to-go content, consistently ranked among the top three choices in nearly every country and sector.

The open comments reinforced this finding.

### **Blended and multi-modal learning is the preferred approach**


Despite being under-selected in the survey (ranked 7th), blended learning was the most frequently mentioned format in the open comments.

This disconnect suggests that blended delivery is already embedded in practice but not perceived as a distinct strategy.

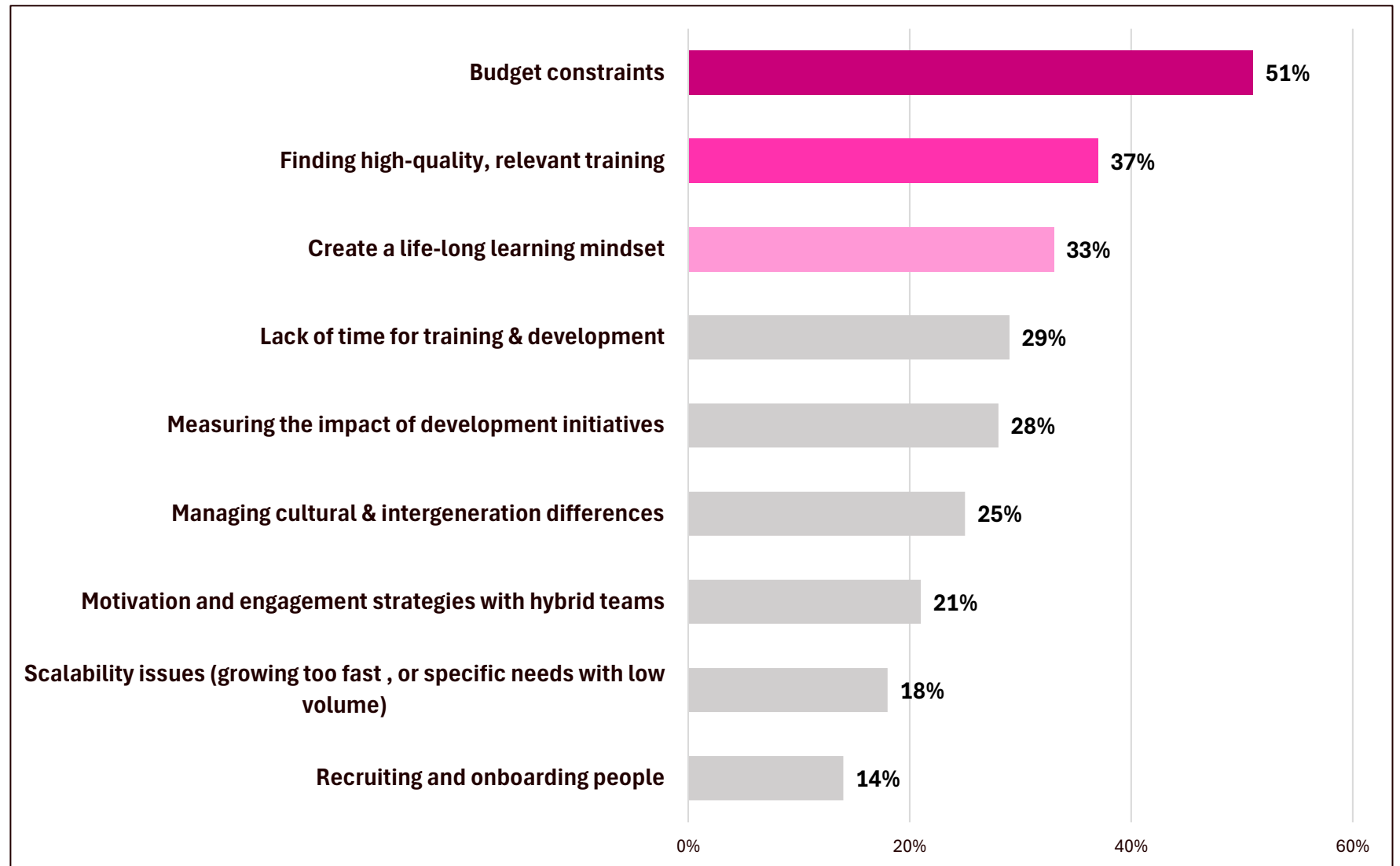
### **Coaching, mentoring and informal learning are growing but under-formalized**

Although not the top method quantitatively, coaching and mentoring appeared regularly in comments, especially for leadership transitions and team development.


Several countries (e.g. Brazil, Portugal, LATAM) show strong interest, often without structured programs.



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## **Budget is the universal challenge**

Budget constraints top the list in structured survey responses across countries and sectors. However, open comments reveal that the true barriers often lie in mindset, leadership engagement, and organizational culture.

This suggests that financial limitations are a surface symptom, not the root cause.

## **Mindset and culture are underestimated in quantitative data**

Open responses consistently highlight challenges with leadership buy-in, employee resistance to training, and lack of a learning culture.

These critical transformation issues are not well captured in structured surveys, suggesting an over-reliance on surface-level metrics.

## **Relevance and engagement are the missing links**

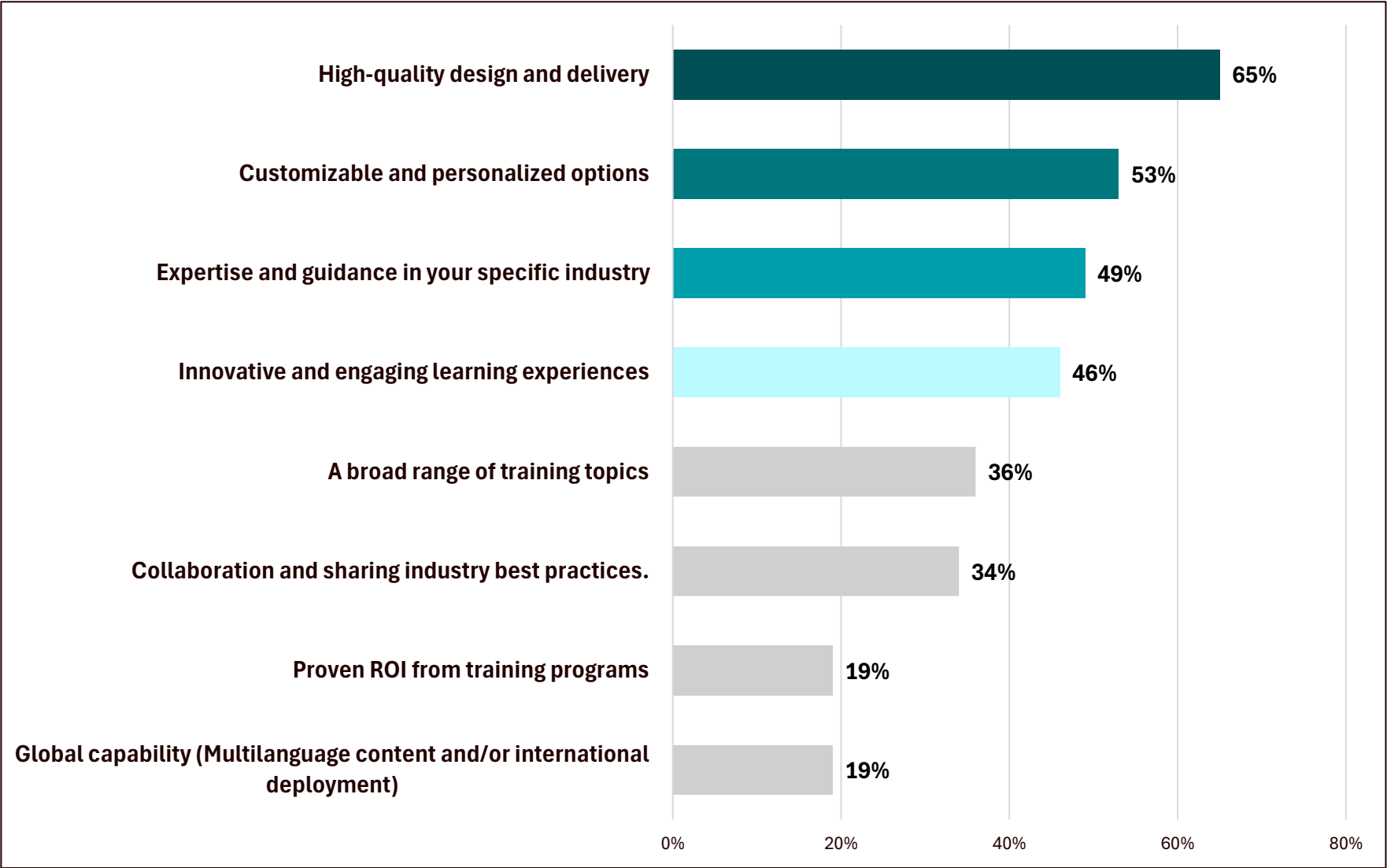
Even when budgets are available, clients struggle to:

- Find training that fits their specific business needs.
- Keep learners engaged, especially in hybrid or online settings.
- Prove that training leads to real business outcomes.

This points to a strategic need for customized, business-integrated, and experiential learning experiences.



# What do you expect and look for in a L&D partner?





## What do you expect and look for in a L&D partner?

### Deep business understanding & strategic partnership

Clients consistently highlight the need for L&D partners to act as true strategic allies.

This means partners must deeply understand their business and industry context, adapting to the company's unique culture, audience, and tone.

Furthermore, clients expect trainers to possess relevant, real-world work experience,

### High quality, relevant & practical delivery

There is a preference for training that is hands-on, experiential, and directly actionable.

Clients value customized and contextualized solutions, far more than off-the-shelf options.

They seek trainers with credibility, authority, and a genuine ability to connect with learners.

### Flexibility, personalization & adaptive learning

Clients appreciate flexibility. This includes the ability to personalize learning journeys, incorporating adaptive learning, and modular formats.

### Innovation & learning experience design

Modern, engaging experiences are essential.

Clients seek proactive input on new learning approaches and market trends.



# 6 critical skills categories that clients need their teams to develop

## 1. Leadership development:

Prepare managers for people & change leadership (coaching, hybrid teams...).

## 2. Learnability & growth mindset:

Build culture of continuous learning and help teams embrace transformation and continuous adaptation.

## 3. Digital & AI skills:

Upskilling programs for non-technical teams to handle digital transitions.

## 4. Job-ready functional skills:

Direct business impact on daily work, like sales, project management, problem solving.

## 5. Teamwork:

Cultural agility and generational diversity management, empathy, resilience, active listening.

## 6. Innovation & problem solving:

Equip teams for complex challenges for adapting to fast-changing business environments.

## 02

# Specific trends & challenges: geographies



# Specific trends and challenges across Europe

## France

### Challenges:

- Relevance and innovation of content.
- Internal impact expectations.

### Expectations:

Clients expect modern, high-quality design with business integration.

- AI / adaptive learning formats.
- Innovation boosters.
- Consultative sales.

2% of respondents

## Germany

### Challenges:

- Strong budget constraints.
- Sourcing relevant training.
- Low learning culture maturity.

### Expectations:

Requires structured, high-ROI programs; demands precision and clarity in offers.

- Clarity.
- Measurable impact.
- Scalable digital learning.
- Integration with workflows.

24% of respondents

## Italy

### Challenges:

- Cultural resistance to hybrid / digital learning.
- Mindset and motivation gaps.

### Expectations:

Clients favor external partnerships but want agility and business relevance.

- Flexible design.
- Strong facilitation.
- Innovation in methods

16% of respondents

# Specific trends and challenges across Europe

## Portugal

### Challenges:

- Learning culture development.
- Customization demand.
- Moderate budget issues.

### Expectations:

Practical and interactive learning is appreciated, informality in coaching.

- Peer mentoring.
- Cost-effective content.
- Adaptable formats

5% of respondents

## Spain

### Challenges:

- Budget constraints.
- Engagement in hybrid formats.

### Expectations:

Prioritize simple, high-quality delivery over complex design.

- Trainer engagement.
- Experiential formats.
- Efficiency in service.

8% of respondents

## Switzerland

### Challenges:

- Cultural diversity.
- Value demonstration.
- Global scalability.

### Expectations:

Small sample but sophisticated market needing high service standards.

- Multilingual delivery.
- Curated premium paths.
- Cross-border offers.

2% of respondents

# Specific trends and challenges: Latin America + Brazil, and China

## Latin America

### Challenges:

- Mindset shift.
- Informal L&D culture.
- Budget variability.

### Expectations:

Strong interest in coaching, experiential formats, relationship-based sales.

- Affordable and modular formats.
- Flexible support.
- Emotional intelligence

*4% of respondents*

## Brazil

### Challenges:

- Mindset resistance.
- Managing diversity.
- Budget limits.

### Expectations:

Strong emotional and relational dynamic; flexibility and adaptability are key.

- Customized engagement strategies.
- Blended learning.
- Co-creation mindset.

*17% of respondents*

## China

### Challenges:

- Budget pressure.
- Proving training effectiveness.
- Low emphasis on soft skills.

### Expectations:

Clients value practical, results-oriented training with post-training tracking.

- Value-for-money.
- Accountability tools.
- Strong customer service.
- Digital readiness.

*22% of respondents*



# 03

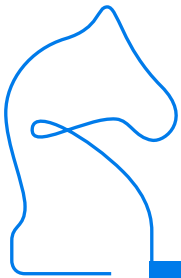
## **Specific trends & challenges: industries**



# Industry-specific L&D challenges

## Industry, Electronics, Automotive, Aerospace

*27% of respondents*



### Challenges

- Cost pressure, demand for measurable impact, tailored technical content, rapid tech transformation.
- Need strong evidence of ROI, practical and contextualized content, resistance to generic solutions.



### Expectations

- Technical trainer expertise, pedagogical innovation, sector-aligned customization, scalable blended offers.

# Industry-specific L&D challenges

## FMCG, BtoC Services, Retail

*14% of respondents*



### Challenges

- High turnover, fast onboarding, hybrid engagement, multi-generational workforce.
- Speed and engagement matter most, preference for mobile/digital learning, informal development strong.



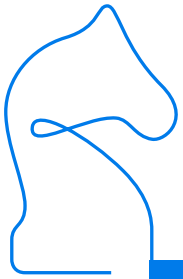
### Expectations

- Self-paced formats, gamification, strong UX, short and impactful content.

# Industry-specific L&D challenges

## Financial Services, Consulting

*12% of respondents*



### Challenges

- Alignment with business strategy, low tolerance for generic content, confidentiality.
- Demand for credibility, innovation and long-term ROI, expectation of partnership.



### Expectations

- Bespoke solutions, high-end facilitation, ROI visibility, integrated diagnostics.

# Industry-specific L&D challenges

## Health and pharma

*7% of respondents*



### Challenges

- Cultural shift, digital transformation, engagement, compliance.
- Balance innovation with regulatory needs, support diversity in training, credibility matters.



### Expectations

- High trainer credibility, interactive formats, scientifically valid content, multi-language support.

# Industry-specific L&D challenges

## Construction, Transport, Logistics

*7% of respondents*



### Challenges

- Time off-job, distributed teams, engagement, practical upskilling.
- Preference for on-the-job, coaching and blended learning, limited digital adoption.



### Expectations

- Face-to-face or hybrid models, contextualized role-based content, peer-based learning.

# Industry-specific L&D challenges

## Utilities, Energy

*6% of respondents*



### Challenges

- Global operations, tech transformation, workforce upskilling.
- Balance global-local learning needs, value engagement and scale.



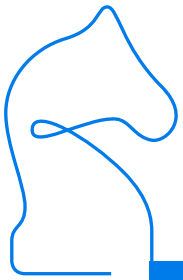
### Expectations

- Flexible formats, multi-region delivery, modular learning journeys.

# Industry-specific L&D challenges

## Public sector

*2% of respondents*



### Challenges

- Bureaucracy, resistance to change, budget constraints, procurement restrictions.
- Training must justify ROI and follow rigid procedures, limited flexibility.



### Expectations

- Price transparency, certifications, local delivery, structured programs.



**Special thanks  
to our clients and our sales teams  
who made this report possible**



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