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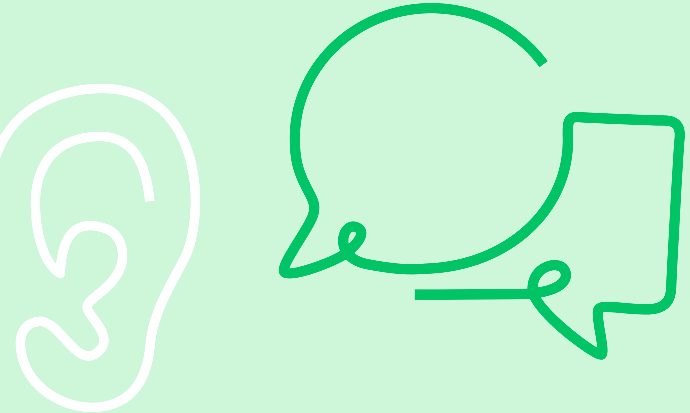
The Voice of our clients 2026

Trends and insights from **919 client** interviews worldwide

May 2026

Why we listen to our clients

As in previous years, Cegos interviewed clients to better understand their skills development challenges, training practices and expectations from L&D partners.



The aim was to identify key trends on:

- clients' **current skills development** and **training challenges**;
- the most **critical skills** and **knowledge areas to develop**;
- **current approaches** to employee training and development;
- **expectations** from a Learning & Development partner;
- emerging topics shaping L&D, including **AI**, **impact measurement** and **learning in the flow of work**.

Methodology:
919 interviews across 11 international Cegos entities

The **2026 report** is based on

919 interviews with **HR and L&D professionals**

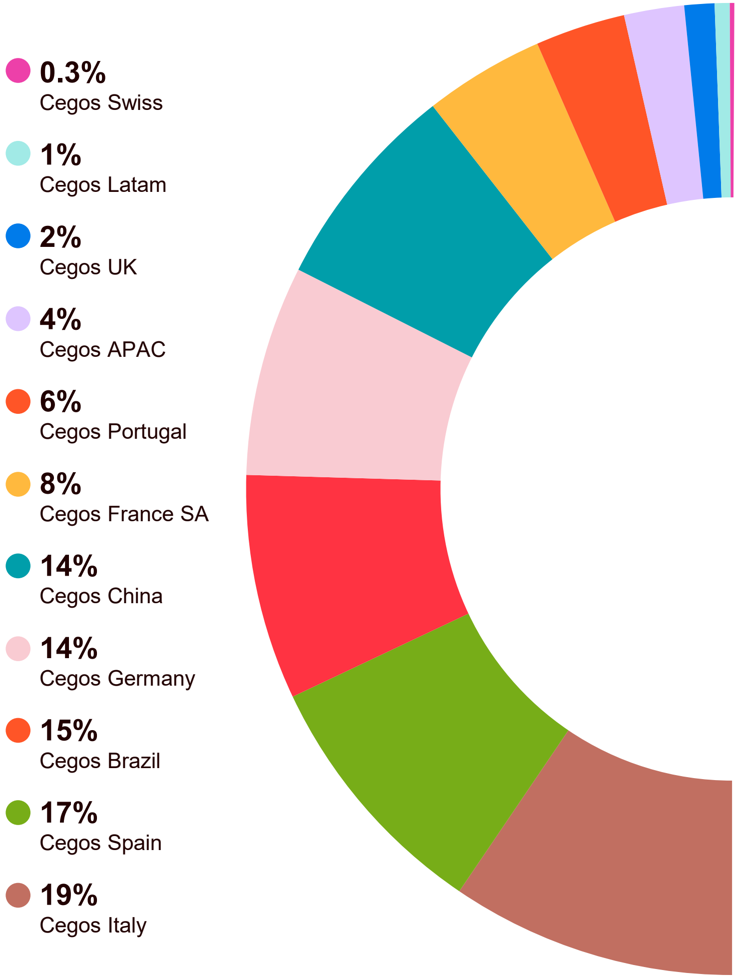
conducted by **110 salespeople**

across **11 Cegos entities**

using **structured questions** and **qualitative comments**

analysed to identify **global patterns**

local differences and strategic implications.



How to read the results

The 2026 Voice of Client survey provides broad international coverage.

However, interpretation should consider participation levels

01 countries/entities with larger samples provide stronger local signals;

02 smaller samples are useful but should be treated as directional;

03 global findings are the most robust;

04 country and sector differences help explain why one-size-fits-all L&D messaging is less effective.

Summary

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01

Key L&D Trends in 2026

Executive abstract: key conclusions

The 2026 Voice of our Clients
highlights **seven key conclusions**:

1.
Clients still want training that is directly relevant to their business context;

2.
Time and budget pressure are now central constraints.

3.
Trainer credibility remains Cegos' strongest commercial differentiator.

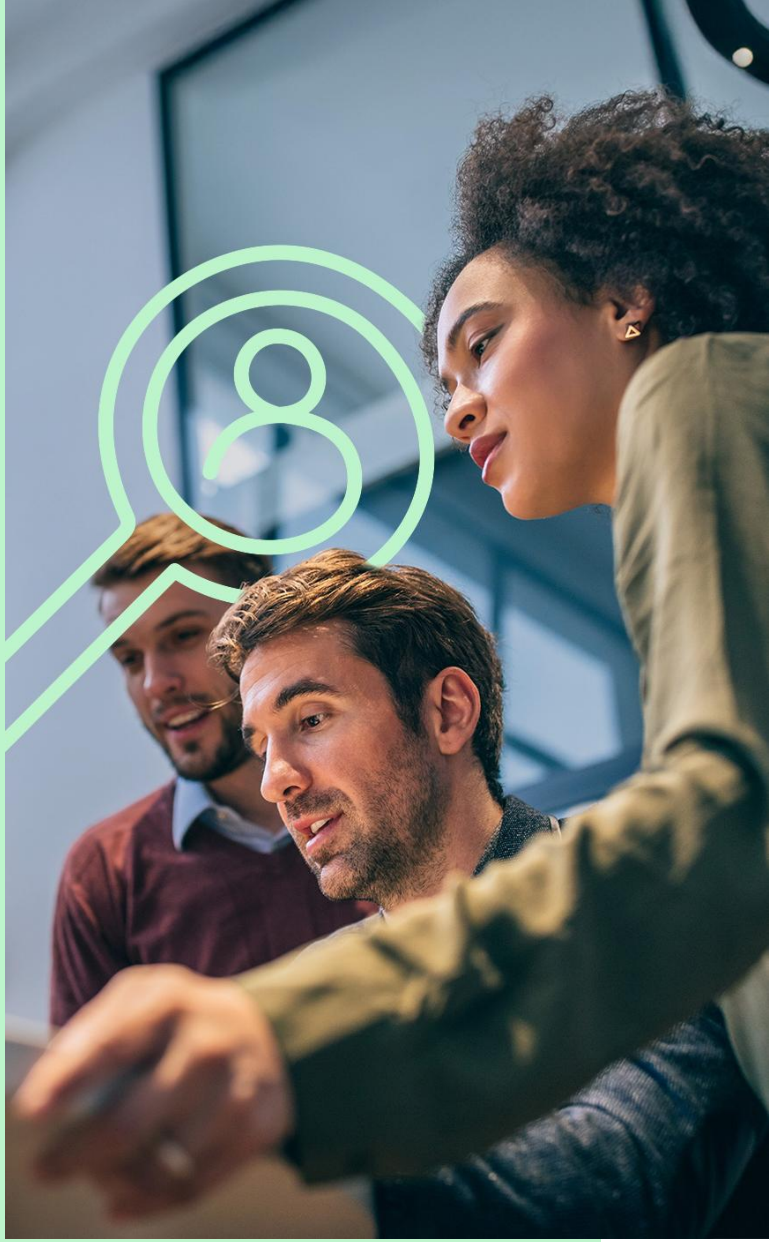
4.
Customization and business fit are expected, not optional.

5.
Internal learning ecosystems and academies are becoming dominant.

6.
AI is reshaping expectations, but clients want practical and trusted use cases.

7.
Impact evidence is becoming essential to justify investment.

What has changed since 2024/2025?



Still true

- Business relevance remains essential.
- Customization is still expected.
- Trainer credibility remains central.
- Application and transfer matter more than content alone.
- Clients still look for long-term L&D partners.

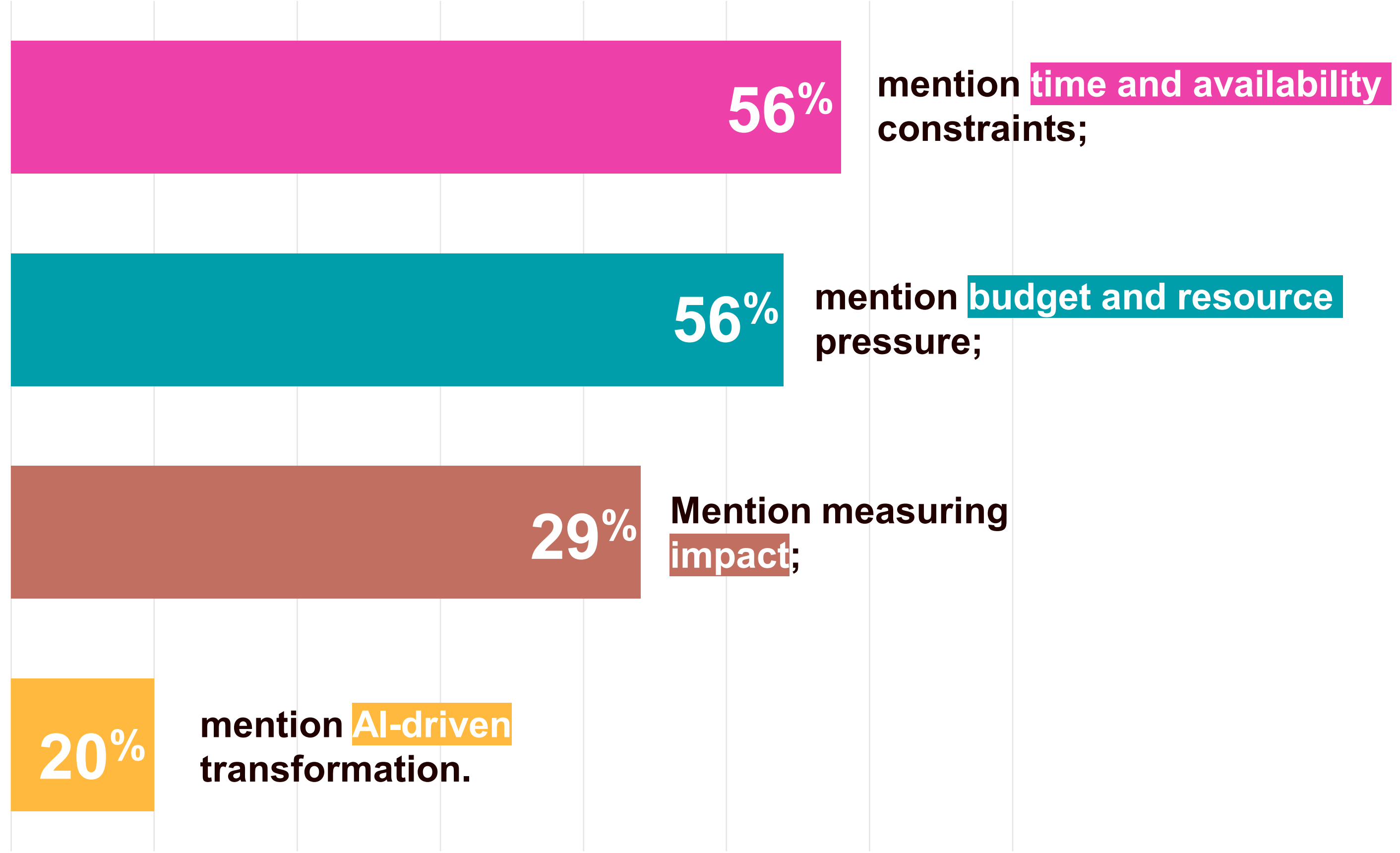
Accelerating now

- Time pressure is stronger.
- Internal academies have expanded.
- AI has become the dominant emerging topic.
- Impact evidence is increasingly needed to justify budgets.
- Local and sector-specific narratives matter more.

Current challenges:
time, budget, impact and AI

Clients value learning, but struggle to make it happen.

The **strongest challenges** mentioned in 2026 are:



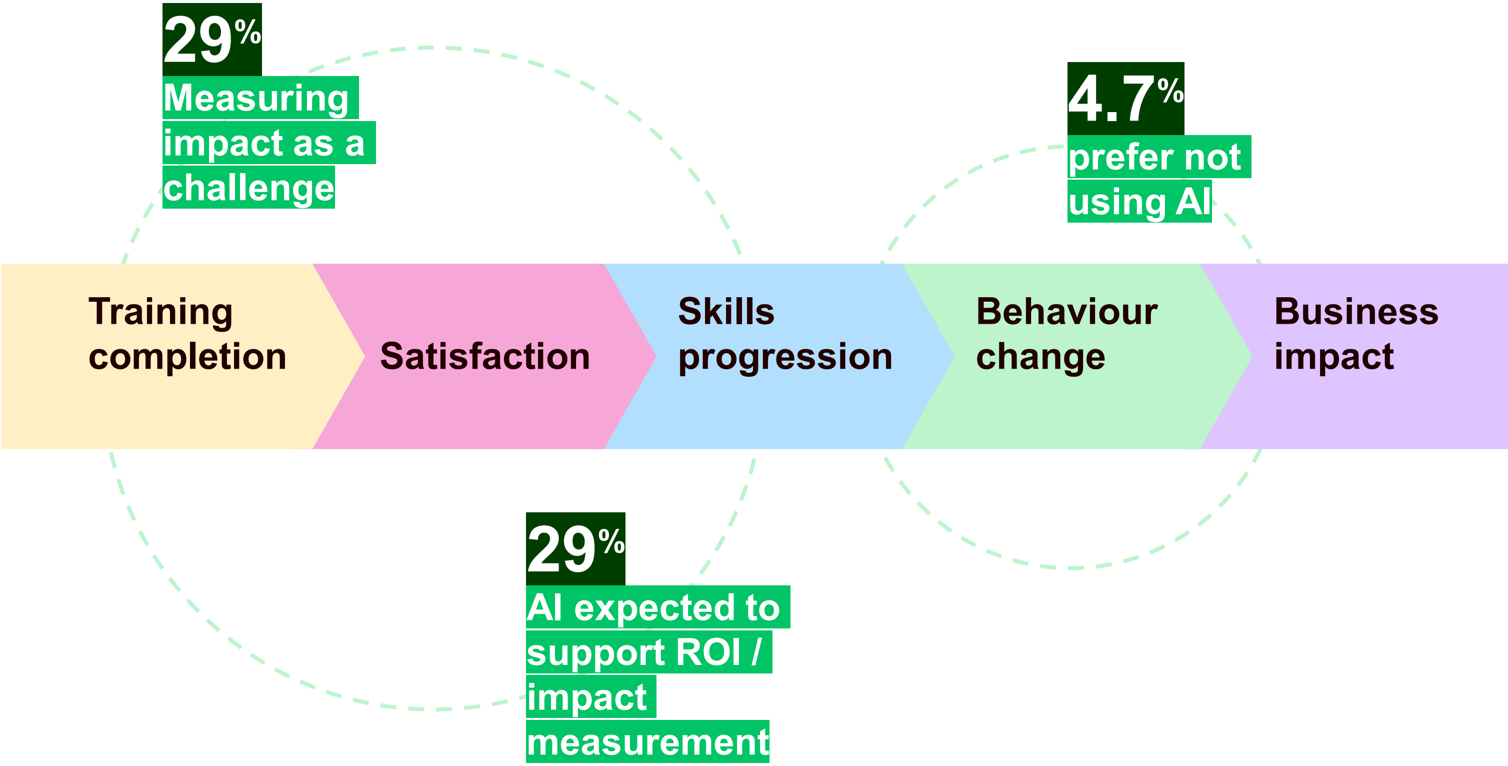
Learning demand is not the issue, time-to-impact is.

Measuring impact:
from training completion to workforce readiness

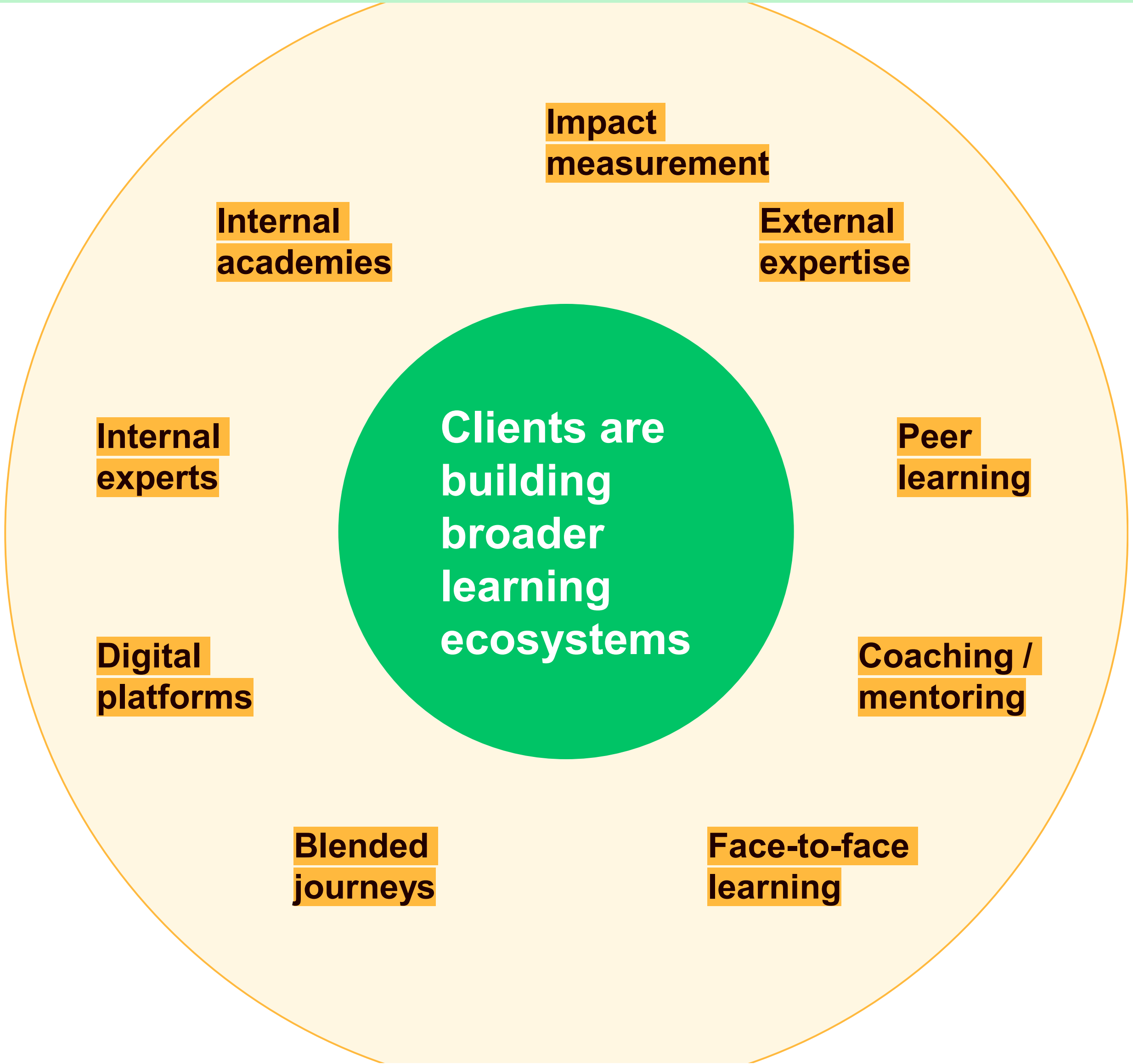
Impact evidence is becoming essential.
Clients **increasingly need proof** of:

- **skills progression;**
- **behaviour change;**
- **transfer to work;**
- **performance improvement;**
- **readiness for business-critical transformations.**

In the **2026 dataset**:



How clients currently approach training and development?



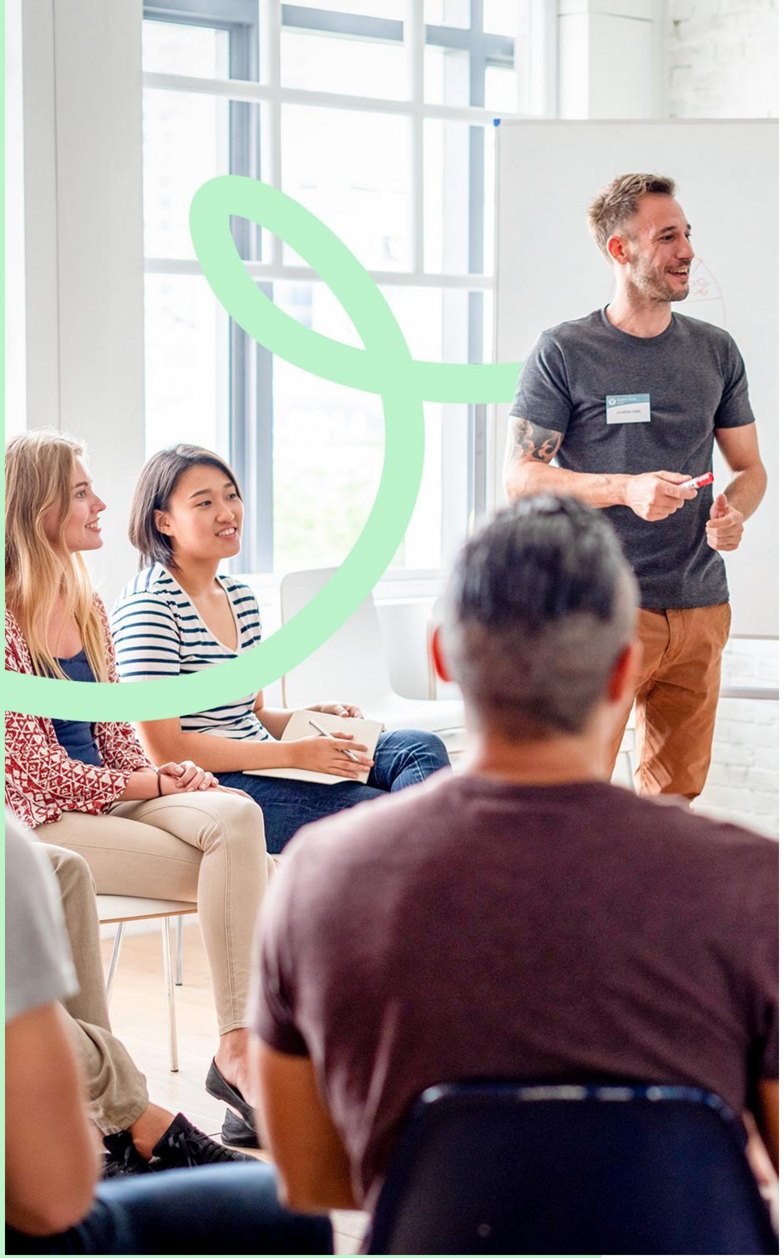
Related 2026 signals across countries

64% cite trainer quality and facilitation as a key provider selection factor

4.7% prefer not using AI

1-11% AI-supported integrated learning remains in early adoption in most countries

Trainer credibility remains critical



Trainer credibility remains one of the strongest signals of quality.

Clients value facilitators who bring:

- **subject-matter expertise;**
- **facilitation skills;**
- **sector experience;**
- **practical examples;**
- **ability to connect with participants;**
- **judgement and human interaction.**

64%
of clients cite trainer quality and facilitation as a key provider selection factor for in-house training.

As AI makes content easier to generate, expert human facilitation becomes more valuable, not less.

What clients expect from an L&D partner

Clients expect L&D partners to provide:

- **strategic partnership and proactivity;**
- **cultural and business fit;**
- **deep understanding of their context;**
- **customization and co-design;**
- **reliable execution;**
- **clear proposals and transparent pricing;**
- **useful innovation;**
- **impact measurement.**

From 2026 partner expectation data:

37% expect **proactivity /strategic partnership.**

34% expect **cultural fit.**

33% expect **deep business understanding.**

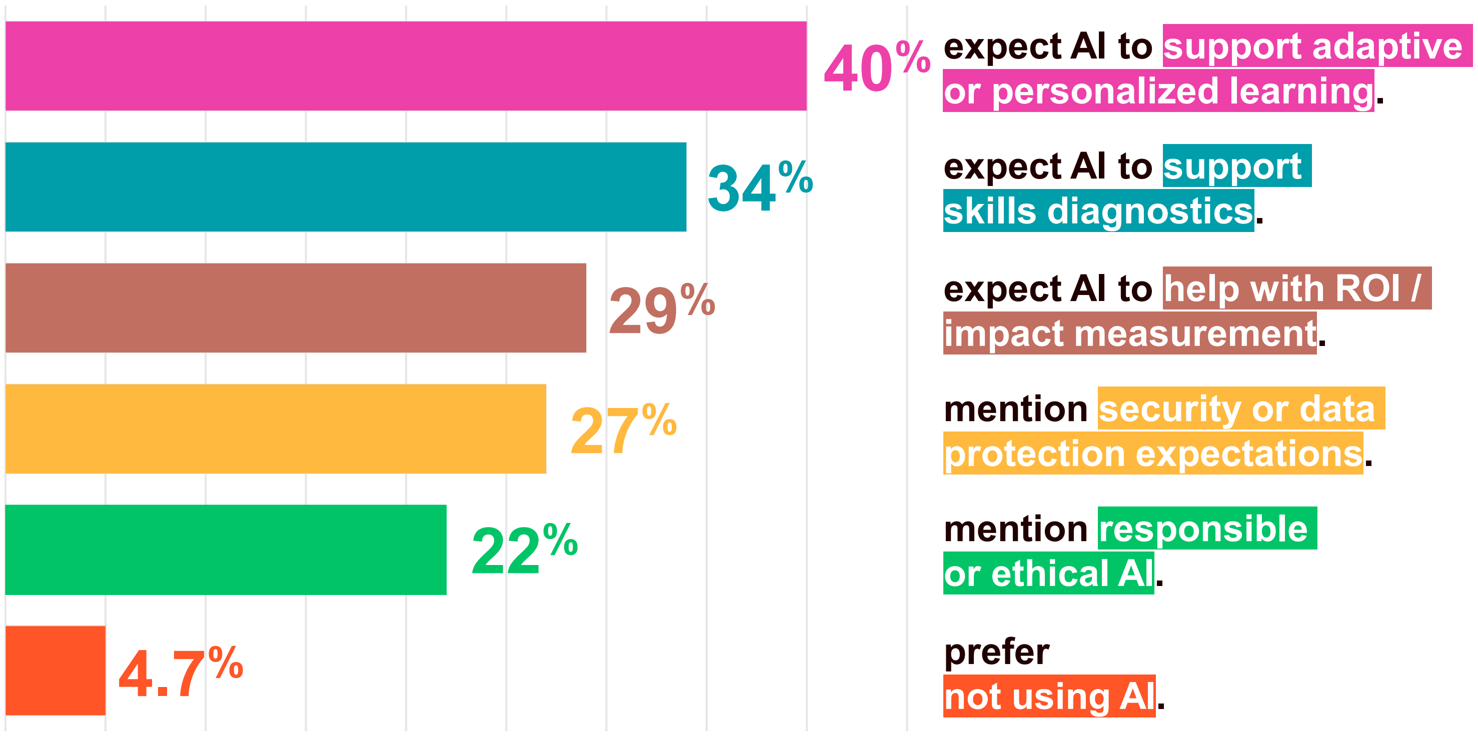
29% expect **innovation** from their L&D partner.

AI in L&D
what clients expect next

Clients are interested in AI, but they want it to be practical, trusted and useful.

They **expect AI** to support:

- **practical use cases in daily work;**
- **personalized learning paths;**
- **skills diagnostics;**
- **simulations and practice;**
- **feedback and reinforcement;**
- **ROI and impact measurement;**
- **responsible and secure adoption.**



AI is not replacing learning expertise.
The strongest model is human-led, AI-supported learning.

Critical skills clients need to develop

Clients continue to focus on **six major skills areas**:

Leadership & management
Preparing managers for change, hybrid teams and people leadership.

AI, digital and data skills
Helping teams use technology and AI in practical, responsible ways.

Adaptability & learnability
Building the ability to keep learning and adapt to transformation.

Job-ready functional skills
Developing skills that improve daily work performance.

Collaboration & communication
Strengthening teamwork, empathy, emotional intelligence and customer focus.

Innovation and problem-solving
Helping teams deal with complexity and change.

Future skills are increasingly hybrid:
organizations need both technical and human capabilities.

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02

Regional Perspectives

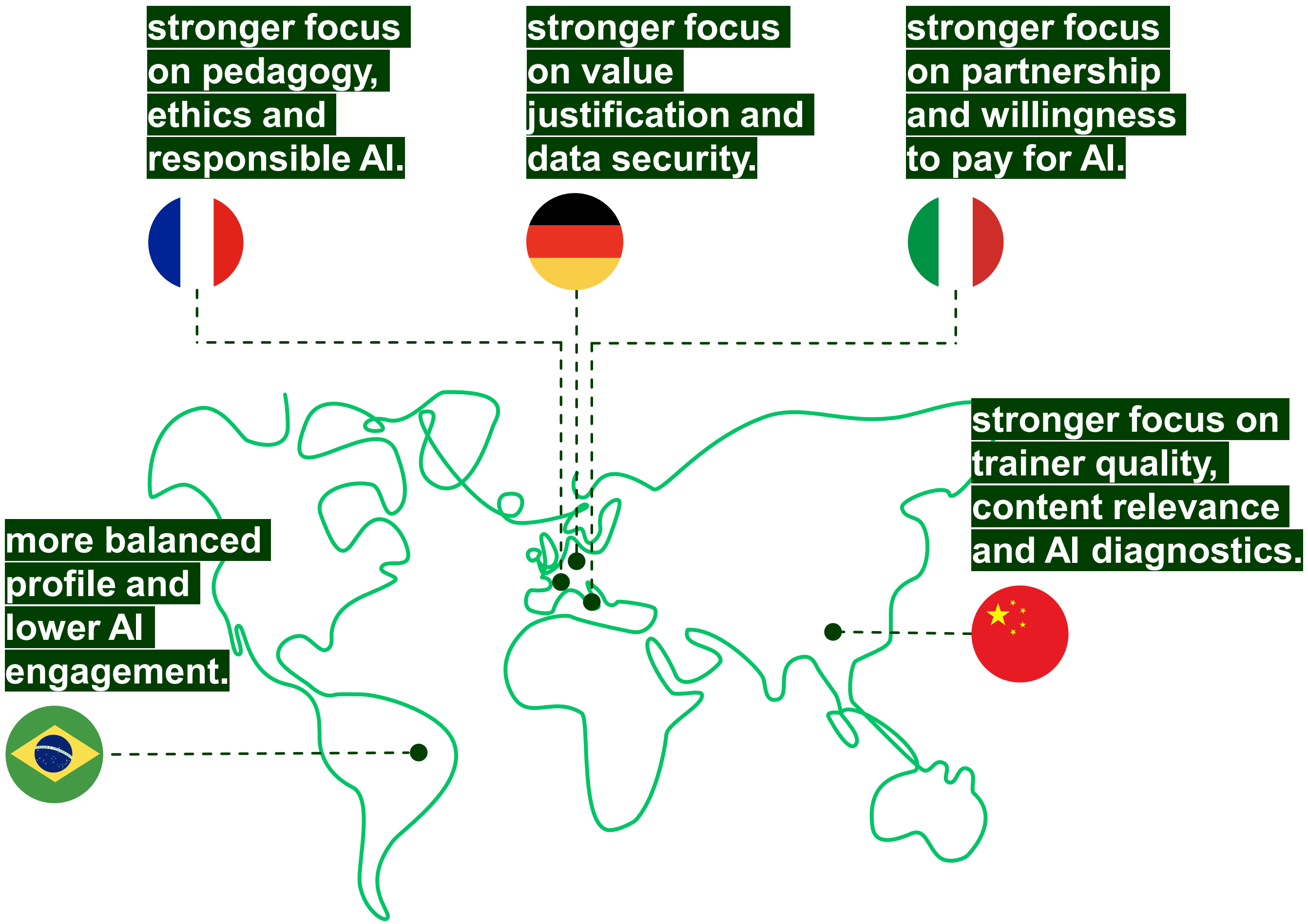
What is universal across markets

Across markets, several expectations are consistent:

What must be adapted locally

Local differences remain important in:

- **pricing expectations;**
- **AI framing;**
- **partnership style;**
- **proposal format;**
- **level of detail required;**
- **maturity around digital and AI learning.**



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Industry Perspectives

Industry-specific L&D challenges

The 2026 interviews **confirm that L&D priorities vary strongly by sector**.

Some sectors focus on **operational performance** and **time-to-impact**.

Others place more emphasis on **compliance**, **trust**, **trainer credibility**, **digital formats** or **workforce transformation**.

There is no single "average" L&D client. Sector context increasingly shapes learning expectations.

- Industry / Manufacturing
- Financial Services
- Utilities / Energy
- Health & Pharma
- ICT / Telco / Media
- Retail / Distribution
- Transport & Logistics
- Aerospace & Defence
- Public Administration
- FMCG / Consumer Goods

Technical, industrial and regulated sectors

Industry / Manufacturing

Clients need practical, field-relevant content, on-the-job learning and ROI measurement.

+10pp content relevance

+9pp on-the-job training

+8pp ROI measurement

Health & Pharma

Clients place stronger emphasis on pedagogical excellence, compliance and sector understanding.

+18pp pedagogical excellence

+17pp deep industry understanding

+16pp on-the-job training

Aerospace & Defence

Clients need practical, field-relevant content, on-the-job learning and ROI measurement.

+35pp responsible / ethical AI

+27pp data security

Financial Services

Clients value partnership, service quality, transparency and proactivity.

+15pp partnership & service quality

+11pp proactivity

Note: *"pp" means percentage points. It shows the difference between two percentages. For example, if the average response is 30% and a sector scores 40%, the difference is +10 percentage points (+10pp). It does not mean "10% more"; it means the score is 10 points higher.*

Fast-moving and distributed sectors

Utilities / Energy

Clients value strategic partnership, scalability and sector benchmarking.

+12pp **strategic partnership**

+8pp **scalable offer**

+8pp **benchmark / sharing events**

Telco & Media

Clients expect faster turnaround, agile delivery and stronger integration with internal systems.

+16pp **time pressure and speed are strong qualitative themes / AI admin automation**

Retail & Distribution

Clients value digital-first formats, flexibility, visual proposals and peer benchmarking.

+18pp **benchmark / sharing events**

+17pp **PowerPoint preferred**

+17pp **AI for admin automation**

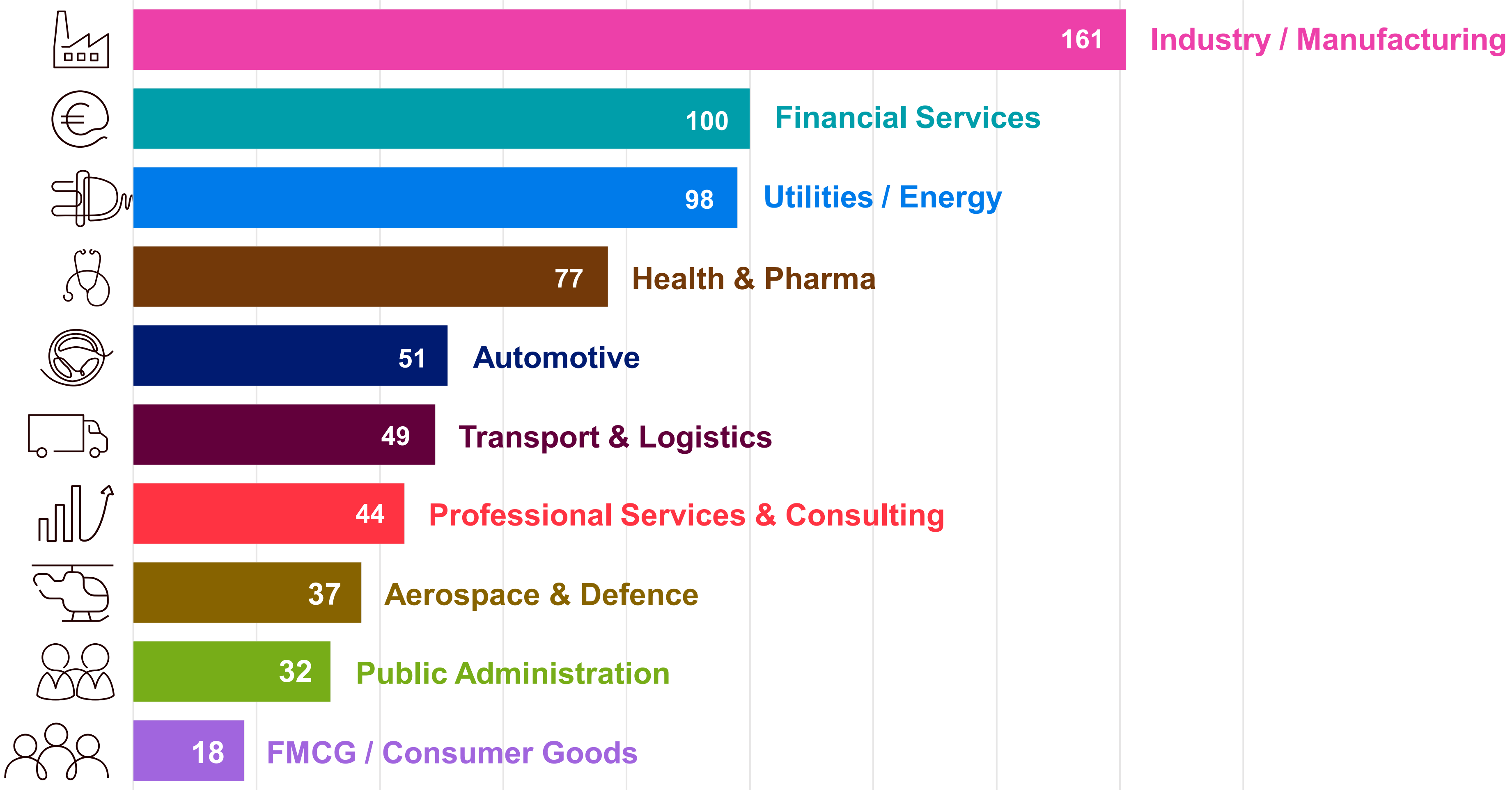
Transport & Logistics

Distributed frontline workforces need mobile-first and work-embedded learning.

mobile-first and frontline learning are key qualitative themes.

Note: *"pp" means percentage points. It shows the difference between two percentages. For example, if the average response is 30% and a sector scores 40%, the difference is +10 percentage points (+10pp). It does not mean "10% more"; it means the score is 10 points higher.*

Sector participation and interpretation



Sector insights are strongest where sample sizes are larger. Smaller samples are useful but should be read directionally.

Country x sector lens

Industry / Manufacturing

China **48**
Italy **38**
Spain **20**
Brazil **16**
Germany **13**

Financial Services

Spain **20**
Italy **14**
Brazil **14**
Germany **12**
France **15**

Utilities / Energy

Germany **22**
Italy **21**
Brazil **14**
Spain **10**
France **8**

04

Looking Ahead: The Future of L&D

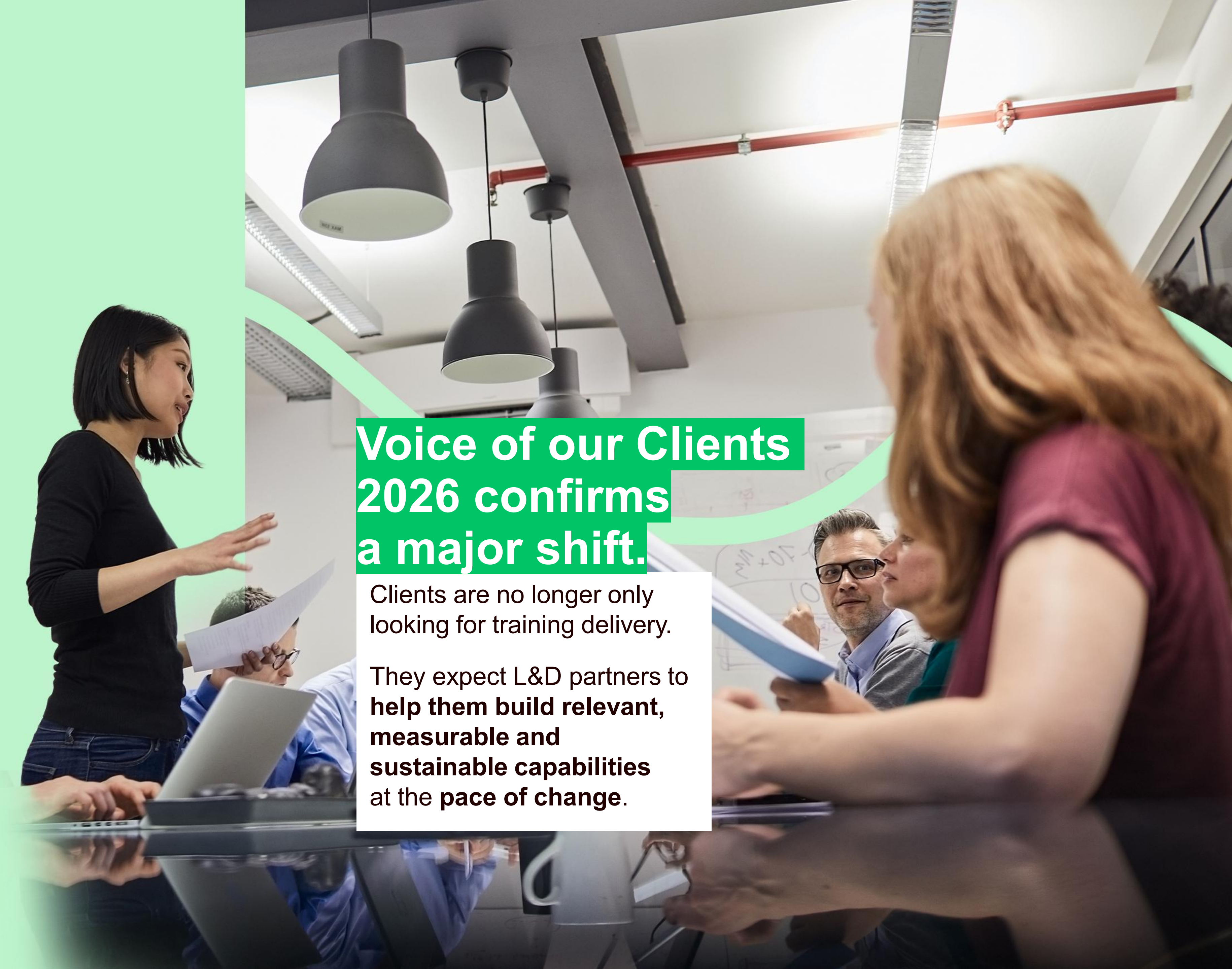
What this means for L&D

The 2026 findings point to a clear evolution of L&D.

Organisations need learning strategies that are:

- **closer to work;**
- **easier to deploy;**
- **more personalized;**
- **more sector-specific;**
- **supported by credible human expertise;**
- **augmented by responsible AI;**
- **measured through skills progression and performance impact.**

Final conclusion



Voice of our Clients 2026 confirms a major shift.

Clients are no longer only looking for training delivery.

They expect L&D partners to **help them build relevant, measurable and sustainable capabilities** at the **pace of change**.

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

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