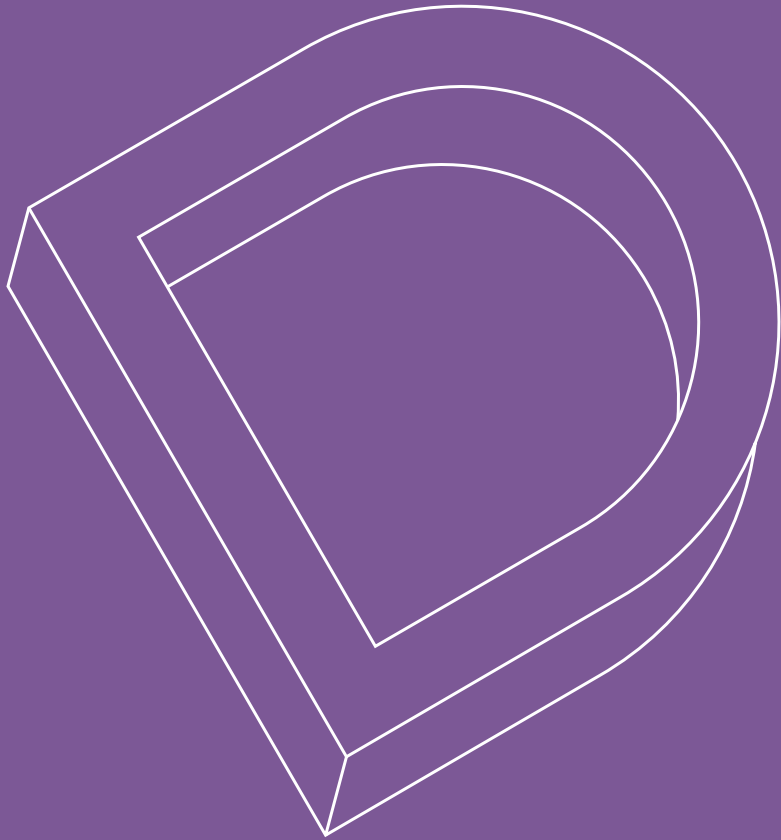DEVELOR

2025

# L&D KALEIDOSCOPE

# 2025 REPORT

## DEVELOR INTRODUCTION

DEVELOR is an international training and development company represented in 15+ countries. We go beyond education – we're a passionate community reshaping organizations into homes of growth. Our mission is clear: make sustainable mindset and behavior change happen, enabling your organization to thrive.

# WHAT SETS US APART?

We forge strategic partnerships, immerse ourselves in understanding your challenges, and craft tailor-made Learning Journeys with an innovative approach. Picture a future where your teams unleash their potential. With DEVELOR, that vision becomes reality. Our commitment to excellence is not just a tagline – it's the foundation of our work. As architects of growth, we leverage cutting-edge technology and innovative methodologies to deliver results that exceed expectations.

**Let's not just train; let's transform. Choose DEVELOR as your partner on this exciting journey of growth, where your organization evolves into its true potential.**

# OUR
# INTERNATIONAL
# COVERAGE

# 15+
### COUNTRIES

"L&D Kaleidoscope" symbolizes the diverse and dynamic nature of L&D. It reflects how different perspectives and strategies come together to shape organizational learning, like a kaleidoscope's ever-changing patterns.

**L&D KALEIDOSCOPE 2025:**
# A FRESH PERSPECTIVE ON LEARNING & DEVELOPMENT

Welcome to the second edition of the L&D Kaleidoscope survey report. Once again, we bring together insights from HR and L&D managers and professionals to explore how workplace learning is changing. But this year, we are not just tracking trends – we are looking deeper into the shifts that are redefining Learning & Development.

With contributions from over 1,770 professionals across 24 countries, this report provides a comprehensive and clear perspective on the ongoing changes and their causes. Organizations are facing new challenges, such as integrating AI and digital tools, while also addressing skills gaps and employee engagement. While some priorities remain steady, others are becoming more urgent. By comparing data over two years, we can identify patterns and emerging strategies that are influencing the present and future of L&D.

Last year's findings reflected a workforce in transition, balancing post-pandemic adjustments, hybrid work, and a growing need for upskilling. By 2025, the focus has sharpened. Organizations are moving beyond short-term adaptations and seeking sustainable L&D strategies that align with business growth, workforce expectations, and rapid technological changes. This shift presents both challenges and opportunities, as HR leaders strive to create learning environments that are not only responsive but also proactive in shaping the future of work.

This report is more than just a collection of statistics; it serves as a practical guide. The collective knowledge shared by almost 2,000 representatives of HR and L&D provides valuable perspectives on what works, what doesn't, and what lies ahead. As you explore the findings, we invite you to reflect, challenge assumptions, and discover new ways to manage learning successfully in your organization.

# RESEARCH METHODOLOGY

## SURVEY OBJECTIVE

The primary goal of the L&D Kaleidoscope 2025 survey was to gain a deeper understanding of the evolving landscape of Learning and Development. By capturing the insights of HR and L&D professionals from various industries and regions, the survey aimed to identify key trends, challenges, and opportunities that are shaping the future of workplace learning. With data gathered over two consecutive years, this edition also concentrated on tracking changes over time, offering valuable insights into how priorities and strategies are evolving.

## SURVEY DESIGN

The research was organized around a quantitative online survey supplemented by a qualitative phase, ensuring a balanced approach to data collection. The survey included structured multiple-choice questions, ranking tasks, and open-ended responses to gather both statistical trends and deeper qualitative insights. Some questions were refined compared to the previous year to reflect emerging trends such as AI-driven learning.

## PARTICIPANTS

This year's survey collected responses from more than 1,770 HR and L&D professionals, maintaining the strong international representation of the 2024 edition. The participants came from a diverse range of industries, and included representatives from organizations of various sizes, ensuring a well-rounded view of L&D practices across different countries, sectors and scales.

## DATA COLLECTION - QUANTITATIVE PHASE

The survey was disseminated through professional networks, LinkedIn, and direct invitations to ensure diverse participation. It featured scaled questions and open-ended responses regarding L&D priorities. Compared to 2024, additional emphasis was placed on AI in learning, hybrid work models, and leadership development priorities.

## DATA COLLECTION - QUALITATIVE PHASE

The survey was complemented by over 240 in-depth interviews, which offered insights into key themes emerging from the quantitative results. These interviews allowed for an exploration of how organizations are implementing their L&D strategies, the obstacles they face, and the best practices they have adopted. The qualitative phase expanded to include senior HR leaders, providing a broader strategic perspective on the role of L&D in business transformation

## GEOGRAPHICAL SCOPE

The survey maintained its international focus, covering this time 24 countries across Europe, the Middle East, and Asia - three more than in 2024. The expansion allowed for a richer dataset, capturing regional variations in learning and development trends. While some trends showed consistency across regions, others revealed distinct differences, particularly in investment levels, the adoption of AI-driven learning solutions, and leadership development priorities.

## COMPANY SIZE DISTRIBUTION

The distribution of company sizes among survey respondents is well-balanced, ensuring diverse representation of different organizational structures. Small companies (0-200 employees) comprise the largest segment, accounting for 40.6 % of responses. Large companies (1,001-10,000 employees) closely follow at 32.7 %, while medium-sized companies (201-1,000 employees) represent 26.8 % of the total.

**32,7%**
Large (1001-10,000)

**40,6%**
Small (0-200)

**RESPONDENTS' COMPANY SIZE**

**26,8%**
Medium (201-1000)
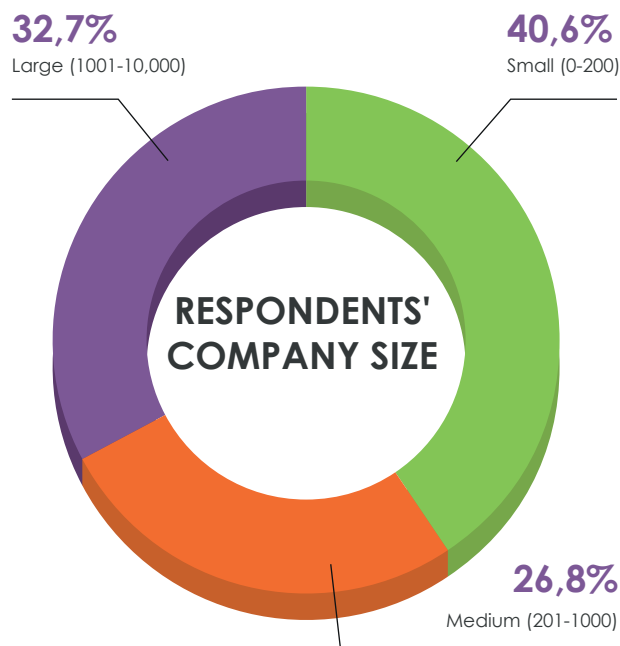
## ETHICAL CONSIDERATIONS

Throughout the research process, stringent ethical guidelines were adhered to in order to maintain data integrity, confidentiality, and participant anonymity. All respondents were made aware of the research's purpose and how their data would be utilized. No personally identifiable information was gathered, and participation remained voluntary.

## ANALYSIS

The collected data went through a thorough analysis process, integrating statistical techniques for quantitative responses and thematic analysis for qualitative data. Key comparisons were made between the 2024 and 2025 datasets, identifying shifts in priorities, budget trends, and leadership development approaches. Qualitative insights enriched these findings, providing real-world context for the statistical trends.

# NUMBERS WITH A TWIST: FACTS THAT MAKE YOU THINK

The most significant rise:
**AI/DIGITAL MINDSET AND SKILLS**
## 29.8%

This training topic has moved from sixth to first place, with 3 out of 10 respondents ranking it among their top three. This clearly indicates that AI and digital skills are no longer just a "nice to have" but a mandatory priority for every company. Digitalization and AI integration have also become key HR priorities, further reinforcing this.

Although employee retention and engagement remained consistent with last year's priorities for HR, the diminished focus on hiring new employees indicates that labor shortages have lessened in most of the markets examined. The economic slowdown has simplified workforce management for companies, and AI's growing role may further support this trend in the medium term.

The biggest decline:
**TALENT RECRUITMENT FELL**
## 25.3%
## 21.4%

**INTENSE USE OF ONLINE TRAINING**
## 46.9%

The balance between online and offline training remains close, with 46.9% of companies using online formats compared to 47.5% for offline. Despite expectations of a decline, online training adoption has risen from last year's 43.5%. Interviews confirm that companies primarily utilize online formats effectively for technical and product training.

A diverse mix of training durations is used: one-third of companies conduct multi-day, half-day, and 60–90-minute online training sessions. One-day training remains the most popular, but companies are choosing these three formats in equal proportion. Respondents ranked 60–90-minute classroom sessions as the least preferred option when selecting their top three training lengths.

| | |
|---|---|
| **MULTI-DAY** | **33%** |
| **HALF-DAY** | **33%** |
| **60–90' ONLINE** | **33%** |

**ONLINE LEARNING USE HAS DECREASED**

**56.4%**
↓
**51.5%**

Although it remains the most commonly used non-trainer-led learning format, this decline suggests that some companies are becoming less satisfied with its effectiveness. Nevertheless, these platforms are still present in every other company. Mobile learning apps were the only category to show significant growth, though adoption stays relatively low at 18%.
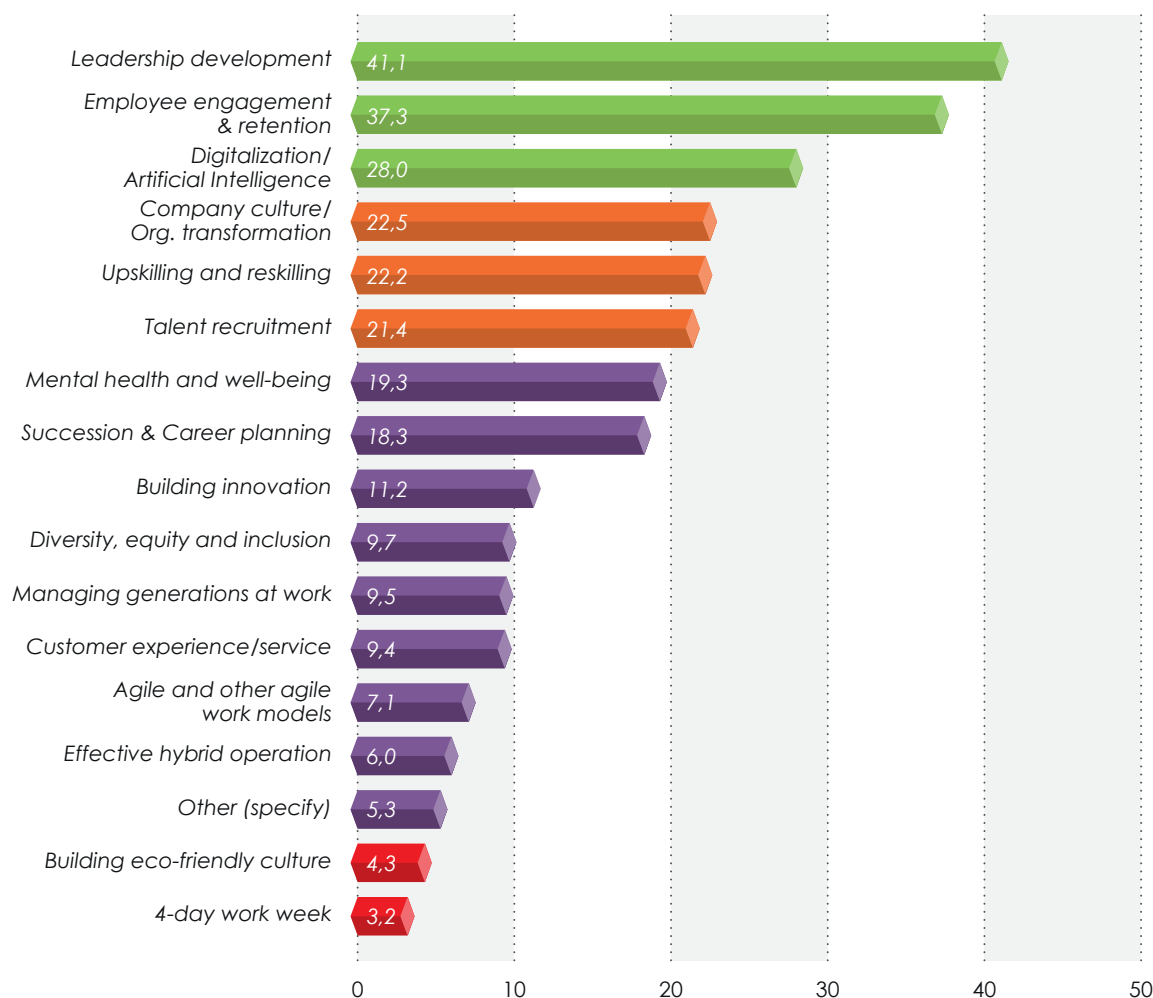
AI adoption in L&D is gaining momentum, with nearly one-third of companies already utilizing it. The fact that one in three organizations has incorporated AI into learning and development highlights its rapid expansion and increasing impact on workplace training.

**AI IS WIDELY ADOPTED IN L&D**
**32.1%**

# HR FOCUS: STRENGTHENING LEADERSHIP, BOOSTING ENGAGEMENT, AND EMBRACING AI

## STRATEGIC HR PRIORITIES IN 2025

| Priority | Value |
|---|---|
| Leadership development | 41,1 |
| Employee engagement & retention | 37,3 |
| Digitalization/ Artificial Intelligence | 28,0 |
| Company culture/ Org. transformation | 22,5 |
| Upskilling and reskilling | 22,2 |
| Talent recruitment | 21,4 |
| Mental health and well-being | 19,3 |
| Succession & Career planning | 18,3 |
| Building innovation | 11,2 |
| Diversity, equity and inclusion | 9,7 |
| Managing generations at work | 9,5 |
| Customer experience/service | 9,4 |
| Agile and other agile work models | 7,1 |
| Effective hybrid operation | 6,0 |
| Other (specify) | 5,3 |
| Building eco-friendly culture | 4,3 |
| 4-day work week | 3,2 |

The HR landscape is continuously evolving, influenced by economic conditions, workforce expectations, and technological advancements.
This year's survey confirms that leadership development has become the most crucial HR concern. Companies recognize that strong leadership is vital for navigating uncertainty, driving performance, and ensuring long-term business resilience. As organizations adjust to new challenges, they need leaders who can inspire teams, manage hybrid work models effectively, and cultivate a culture of learning and innovation.

Employee engagement and retention, which was the top priority in 2024 by a significant margin, still remain major concerns. Keeping talents engaged is still vital.

The most significant change is the increasing importance of digitalization and the use of artificial intelligence. By 2025, it became the third most important HR priority, with 28% of respondents selecting it. Last year, it ranked lower, indicating a shift from exploration to active workforce development and operations implementation. AI and automation are not only transforming how work is done but also how employees learn, and interact. Companies are seeking ways to leverage AI for personalized learning, data-driven decision-making, and more efficient HR processes. While AI is still in the early stages of adoption in many HR functions, its growing influence is undeniable.

# COMPARING THE TOP 5 PRIORITIES OF 2024 AND 2025

## TOP 5 HR PRIORITIES

| | 2025 | 2024 |
|---|---|---|
| 1 | **Leadership development** | Engagement & retention |
| 2 | **Engagement & retention** | Leadership development |
| 3 | **Digitalization/ Artificial Intelligence** | Talent recruitment |
| 4 | **Company culture/ Org. transformation** | Training for all |
| 5 | **Upskilling and reskilling** | Company culture/ Org. transformation |

*Although the pressure on the labor market has eased – likely only temporarily – employee engagement remains critically important, and leaders are the key differentiating factor in this. That's why it's so essential to keep our focus on them and invest in their development.*
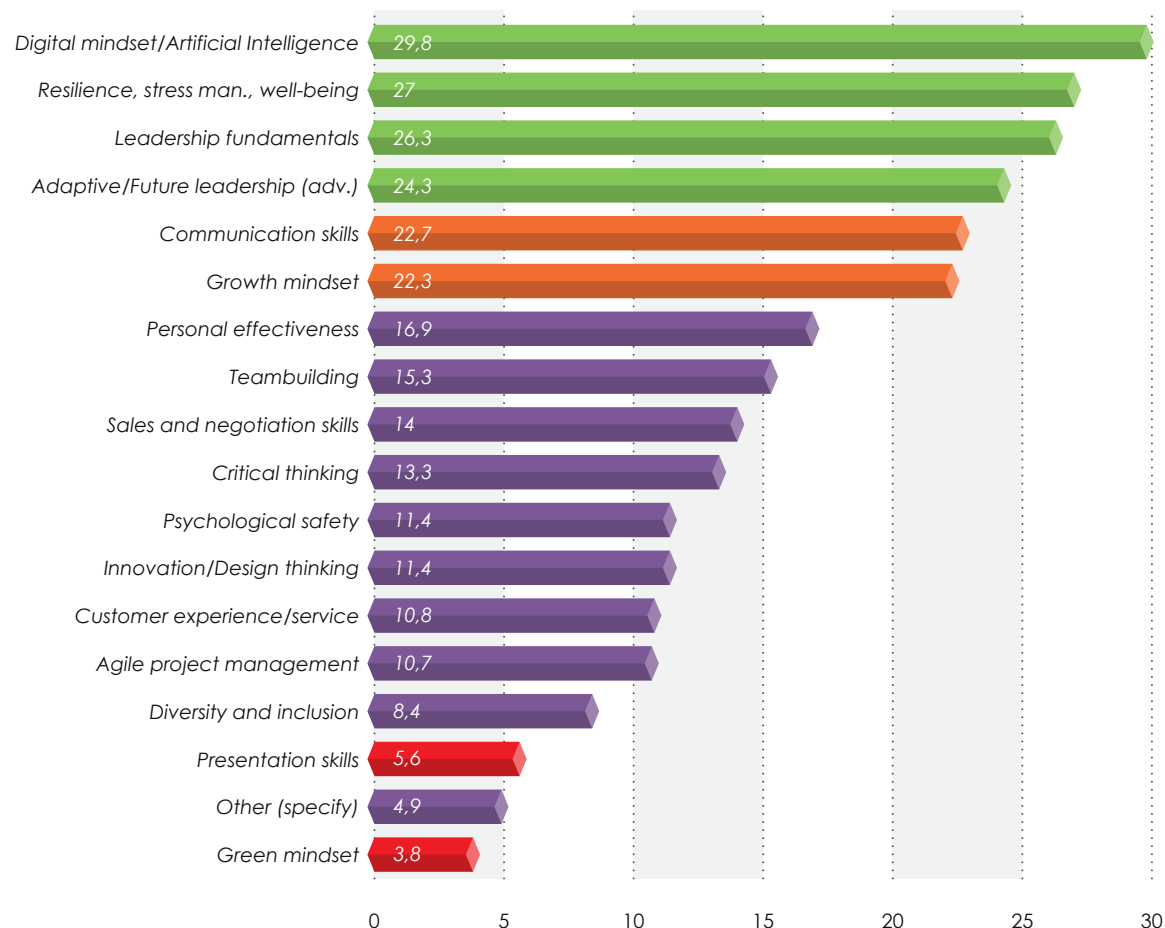
Last year, employee engagement and retention dominated HR priorities, as companies struggled to keep their workforce motivated in a competitive job market. It is still a crucial topic, but AI and digitalization have become even more important. In 2024, HR professionals were still in the exploratory phase of AI adoption. In 2025, however, businesses are actively integrating AI-powered tools for training, recruitment, and workforce planning.

Leadership development, which was already a top focus in 2024, has further cemented its status as the foremost HR priority in 2025. Organizations have recognized that effective leadership is not merely a competitive advantage but a crucial requirement for managing complexity and fostering long-term success.

Reskilling and upskilling remained in the top five without any change, demonstrating the need to adapt to a fast-changing world in which new technologies, evolving business models, and shifting job requirements demand continuous learning and skill development to stay competitive.

Looking ahead, the way HR functions will continue to evolve. While leadership, engagement, and AI dominate today's discussions, future trends may bring even greater technology integration, a renewed emphasis on employee well-being, and innovative approaches to workforce flexibility. HR professionals who stay ahead of these changes will be best prepared to build strong, resilient, and future-ready organizations.

# PREFERRED TRAINING TOPICS: AI, LEADERSHIP, AND RESILIENCE AT THE FOREFRONT

## PREFERRED L&D TOPICS IN 2025

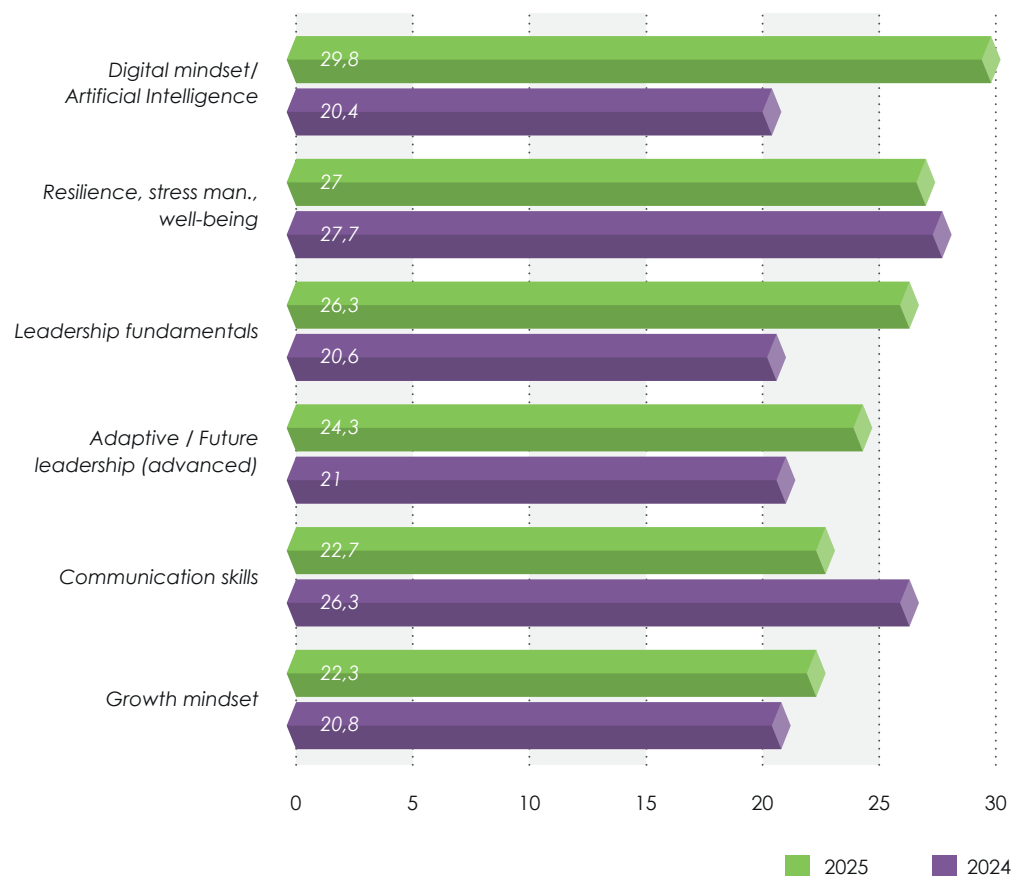| Topic | Value |
|---|---|
| Digital mindset/Artificial Intelligence | 29,8 |
| Resilience, stress man., well-being | 27 |
| Leadership fundamentals | 26,3 |
| Adaptive/Future leadership (adv.) | 24,3 |
| Communication skills | 22,7 |
| Growth mindset | 22,3 |
| Personal effectiveness | 16,9 |
| Teambuilding | 15,3 |
| Sales and negotiation skills | 14 |
| Critical thinking | 13,3 |
| Psychological safety | 11,4 |
| Innovation/Design thinking | 11,4 |
| Customer experience/service | 10,8 |
| Agile project management | 10,7 |
| Diversity and inclusion | 8,4 |
| Presentation skills | 5,6 |
| Other (specify) | 4,9 |
| Green mindset | 3,8 |

The 2025 survey highlights a clear change in learning and development priorities, with digital mindset and Artificial Intelligence emerging as the most in-demand training topic, selected by nearly 30 % of respondents amongst their top3 topics. This topic was just number 6 a year ago, the rapid growth is visible and undeniable. As AI tools become more prevalent in workplaces, organizations recognize the urgent need for employees to develop AI literacy, and adaptability to digital transformation. AI is no longer a distant trend but an essential capability required across all levels of the workforce.

Resilience, stress management, and well-being rank as the second most crucial focus area, compared to be the first last year. At 27 %, this reflects the ongoing need to equip employees with techniques to handle workplace stress, and face with uncertainty. As work environments remain dynamic, organizations prioritize mental health initiatives and tools to enhance employee resilience.

Leadership development remains a top priority, with both fundamental and advanced leadership skills ranking in the top four. Leadership basics ensure that new and emerging leaders develop core managerial skills, advanced leadership for mid- and top managers also gained more importance. Organizations recognize that leaders today must guide teams through change, drive innovation, and make strategic decisions in uncertain environments.

# DIGITAL MINDSET AND ARTIFICIAL INTELLIGENCE BECAME HOT

## PREFERRED L&D TOPICS IN 2025

| Topic | 2025 | 2024 |
|---|---|---|
| Digital mindset/ Artificial Intelligence | 29,8 | 20,4 |
| Resilience, stress man., well-being | 27 | 27,7 |
| Leadership fundamentals | 26,3 | 20,6 |
| Adaptive / Future leadership (advanced) | 24,3 | 21 |
| Communication skills | 22,7 | 26,3 |
| Growth mindset | 22,3 | 20,8 |

Legend: ■ 2025 ■ 2024

Communication skills development, while still important, has declined slightly in priority. Similarly, growth mindset remains relevant but has shifted in emphasis.

AI as a training topic has grown by 50% in just one year, likely making it the fastest-growing training area within such a short period. Given the sharp rise in AI-related inquiries we receive, we expect this trend to continue.

Leadership development, already at high levels in 2024, has increased even further in both categories. This clearly indicates that training investments are being directed even more toward this target group. Our experience confirms this, as comprehensive development programs have overtaken standalone training sessions almost everywhere. Organizations increasingly recognize that only development initiatives with real impact are worth investing in, those that drive lasting behavioral change and measurable results.

It is important to highlight that growth mindset has secured its place in the top five, reinforcing its position as the most essential mindset development program. This explains why it remains one of the most frequently delivered trainings in Develor's portfolio, both for employees and leaders. The reasoning is clear: without this attitude, training programs struggle to drive real change, and a fixed mindset employee will face challenges in various aspects of work in a constantly changing environment.

# LEADERSHIP IN TRANSITION: ENGAGING AND DEVELOPING PEOPLE, AND EMBRACING CHANGE

## THE MOST IMPORTANT LEADERSHIP COMPETENCIES

| Competency | Value |
|---|---|
| Motivation, and engagement of staff | 34,6 |
| Developing others, talent management | 29,5 |
| Agility and adaptability to change | 28,5 |
| Giving and receiving feedback | 26,9 |
| Team collaboration and trust | 26,1 |
| Creating and sharing vision and strategy | 25 |
| Problem-solving and decision-making | 24,1 |
| Communication and conflict resolution | 21,2 |
| Delegation and performance management | 20,8 |
| Creating psychological safety | 17 |
| Empowerment | 14,2 |
| Supporting innovation and creativity | 11,6 |
| Critical thinking | 11,6 |

The survey asked respondents to identify the most important leadership competencies. The results highlight shifting expectations compared to the 2010s and before, shaped by more demanding employees, the entry of Generation Z into the workforce, and increasing workplace complexity. Leaders are expected to move beyond traditional management, fostering a human-centered, adaptive approach that prioritizes psychological safety. Employees need environments where they feel secure expressing ideas, taking risks, and growing without fear of negative consequences.

Motivating and engaging staff has emerged as the most critical leadership competency, emphasizing the need for leaders who inspire, build trust, and create workplaces where employees feel valued. People development and talent management closely followed, highlighting the expectation that leaders actively support employee growth and ongoing learning. Agile mindset and adaptability are crucial in today's rapidly changing and unpredictable world. Leaders must navigate swift technological advancements, shifting market conditions, and evolving workforce expectations.

As leadership expectations continue to evolve, are you prioritizing these competencies within your organization? Do your training programs cover these critical areas to prepare leaders for future challenges? Furthermore, can they effectively apply these skills in their daily work?

# DEVELOR'S EXPERIENCE CONFIRMS THESE PRIORITIES

Our own client observations echo these findings. There is a rising demand for leadership programs that focus on engaging employees, giving and receiving feedback, and developing talent.

Organizations are increasingly requesting training on change management and an agile mindset, reflecting the need for leaders to be both adaptable and people-oriented. As leadership expectations evolve, companies are investing in skills that balance human connection with the ability to lead through uncertainty.

To build strong leadership for the future, organizations need to invest in training programs that equip leaders with the skills to engage employees, foster collaboration, and lead confidently in uncertainty.

# CHALLENGES IN LEADERSHIP DEVELOPMENT AND KEYS TO AN EFFECTIVE PROGRAM

One of the main difficulties in leadership training is ensuring participants apply what they learn. Many leaders complete programs but struggle to integrate new skills into daily work. Knowledge alone does not improve leadership – consistent application does.

Another issue is that experienced leaders often believe they have learned all they need. While they may be familiar with leadership principles, the real challenge is using them effectively. Without reinforcement, even the best insights fade, leading to little long-term impact.

Many programs focus only on first-line and mid-level managers, excluding senior leadership. Without participation from top management, training efforts lose momentum. Executives must stay updated on modern leadership approaches to avoid a disconnect where lower levels adopt human-centered leadership while senior leaders rely on outdated practices. This gap can create misalignment and hinder progress.

Leadership development succeeds when it is continuous, applied, and fully integrated into the organization. Programs must provide structured learning, ongoing reinforcement, and participation from all leadership levels. Without these elements, even the best-designed training will have little long-term impact.

# TRAINING DELIVERY: THE BALANCE BETWEEN ONLINE AND OFFLINE

## WHAT LEARNING FORMS DO YOU USE?

**5,6%**
Don't know

**47,5%**
Offline

**46,9%**
Online
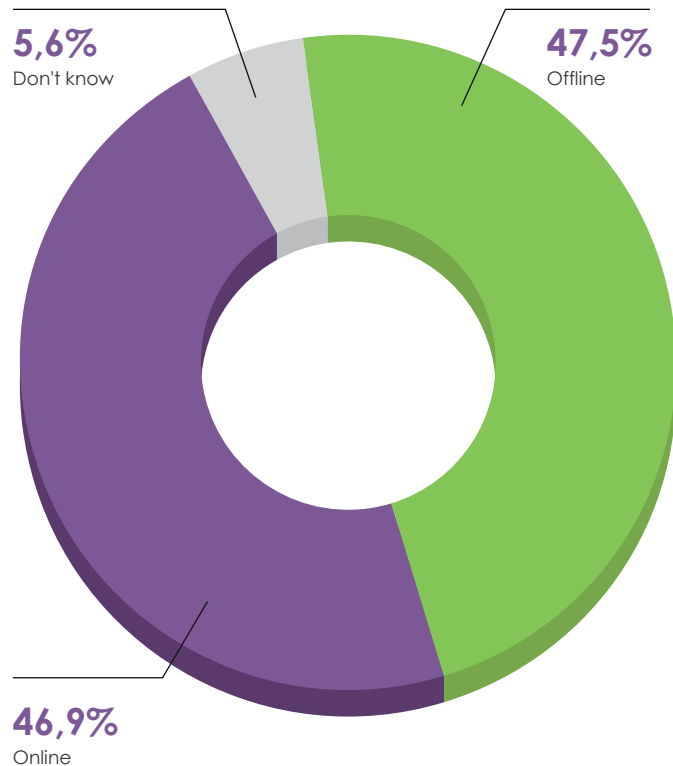
The 2025 survey results indicate that organizations are moving toward a deliberate balance between online and offline training rather than favoring one format over the other. The data shows that 47.5 % of organizations still rely primarily on offline training, while 46.9 % have adopted online learning as a dominant or equally important approach. Only a small percentage remain uncertain about their future strategy, suggesting that most companies have now settled on clear learning delivery models.

This shift reflects a deeper understanding of when and how different formats are most effective. Online learning has solidified its role as a cost-effective, scalable, and flexible solution that can be used for theoretical learning, knowledge transfer, and asynchronous skill development. Organizations recognize that virtual training works well for broad employee groups and ongoing learning initiatives, but it may not fully replace hands-on skills training.

Offline training remains crucial for high-impact leadership programs, soft skills development, and collaborative learning experiences. In-person sessions facilitate real-time feedback, networking opportunities, and deeper discussions, elements that are difficult to replicate in a fully digital environment. Many companies are opting for blended learning models, where theoretical foundations are covered online, followed by in-person workshops that reinforce learning through application and interaction.

Another key reason for this balance is employee preference. While online learning offers flexibility, many professionals still value the structure and engagement of in-person training. Employees working remotely often seek face-to-face sessions to reconnect with their colleagues, while those in office settings appreciate the convenience of online modules that allow them to learn at their own pace.

The shift from 2024 to 2025 shows an evolution from the experimental adoption of digital learning to a more structured and integrated approach. Last year, many companies were still exploring whether online learning could fully replace in-person training, driven by cost considerations and post-pandemic digital acceleration. This year, the consensus is clear—while online training is essential to corporate learning strategies, it is not a universal replacement for offline training.

In 2024, companies were either strongly committed to online training or hesitant to move away from offline learning. In contrast, 2025 data reflects a more mature, hybrid approach, where companies actively design training journeys that combine online and offline elements. The increase in blended learning programs suggests that organizations have moved beyond the question of which is better and now focus on how to integrate both effectively.
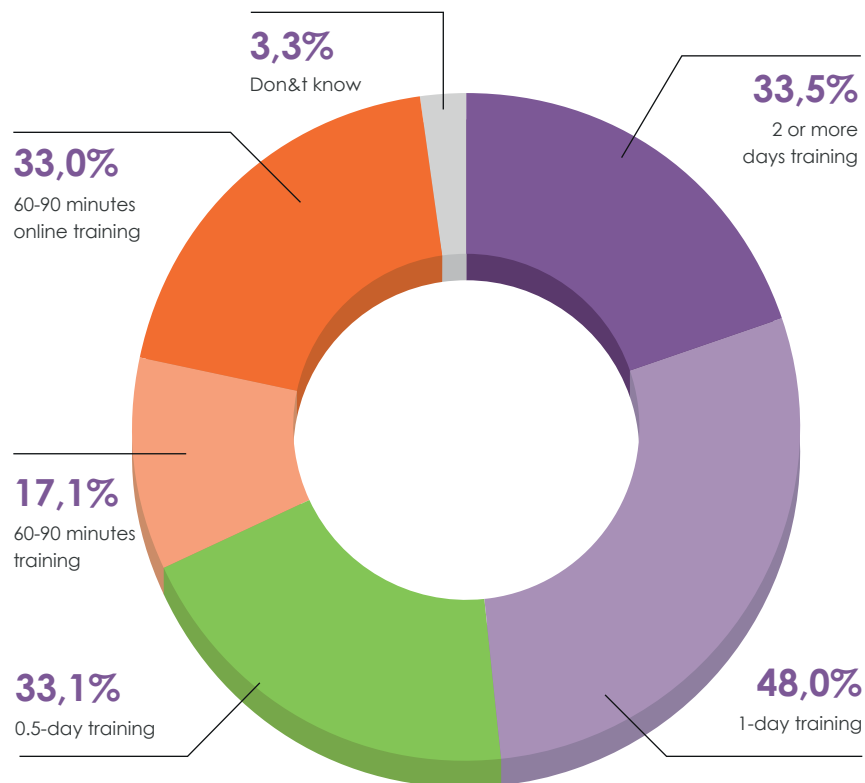
## KEY FACTORS FOR EFFECTIVE ONLINE TRAINING

In spite of the fact that online learning is so popular as it was showed by the survey, many programs still fail to engage learners or deliver meaningful outcomes. Non-interactive lectures, poorly structured content, and a lack of real-world application often lead to passive participation and low retention. Without the right approach, online training risks becoming an obligation rather than an opportunity for development.

For online training to be truly effective, it must go beyond simply transferring information. It should actively involve participants, encourage the application of new skills, and provide ongoing reinforcement. A well-designed program makes learning engaging, practical, and adaptable to the needs of individuals and organizations alike.

# THE GOLDILOCKS EFFECT*: FINDING THE PERFECT TRAINING DURATION

## PREFERRED LENGTH OF TRAINING

**3,3%**
Don&t know

**33,5%**
2 or more days training

**33,0%**
60-90 minutes online training

**17,1%**
60-90 minutes training

**48,0%**
1-day training

**33,1%**
0.5-day training

The 2025 survey results reveal that organizations are striving to find the right balance between depth and efficiency in training duration. Since participants could choose up to three preferred formats, the data reflects a mix of training lengths rather than a single dominant preference.

One-day training remains the most frequently chosen format, with nearly half of respondents including it among their top three. This suggests that companies see it as an effective way to provide meaningful learning without taking too much time away from daily work. Half-day training is also widely favored, reinforcing the need for sessions that maximize learning while minimizing disruption.

> *Online training is definitely here to stay – because it works. But it's important to understand what it's good for and what it's not. It's effective for knowledge transfer, even in soft skills – but in-person practice is still essential!*

* The Goldilocks Effect in training means finding the ideal balance - not too long to be inefficient, not too short to lose impact, but just right to maximize learning and business value.

There is a clear increase in the selection of 60-90 minute-long training sessions, both in-person and online. This reflects the growing demand for shorter, targeted learning that fits into busy schedules. These formats work well for reinforcing key concepts, addressing specific skills, and maintaining engagement without overwhelming employees. However, shorter sessions also present challenges, as they may lack depth, reduce opportunities for discussion, and limit hands-on practice.

Multi-day training, once a staple of corporate learning, is becoming less common. Fewer respondents selected this as one of their preferred options, signaling a shift toward modular, time-efficient learning models. The decline of longer sessions may help reduce costs and scheduling difficulties, but it also means less opportunity for relationship-building, deep discussions, and immersive learning experiences.

The small percentage of respondents who expressed uncertainty about training length suggests that most organizations have now developed clear learning strategies. Instead of experimenting with formats, companies are fine-tuning their approaches to make training more efficient while ensuring it remains effective.
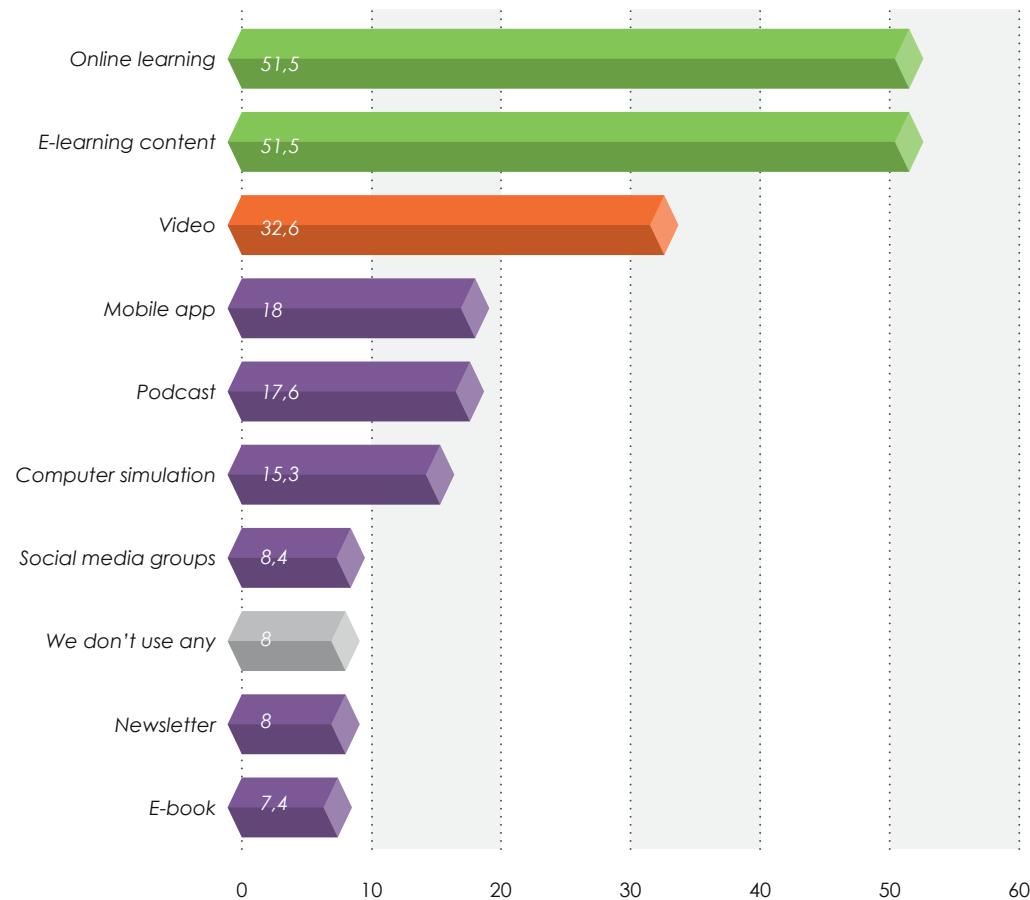
For training providers, these findings highlight the importance of offering modular, flexible programs that maintain depth while adapting to shorter timeframes. Blended learning approaches that combine short interactive sessions with digital reinforcement will be key to ensuring lasting impact.

For companies training their employees, the results suggest that learning must be structured as an ongoing process rather than a one-time event. Organizations should consider breaking longer programs into a series of shorter sessions, leveraging digital tools for reinforcement, and creating interactive, application-driven learning experiences.

# ASYNCHRONOUS LEARNING: OPPORTUNITIES AND CHALLENGES

## PREFERRED ASYNCHRONOUS DEVELOPMENT FORMS IN 2025

| Form | Value |
|------|-------|
| Online learning | 51,5 |
| E-learning content | 51,5 |
| Video | 32,6 |
| Mobile app | 18 |
| Podcast | 17,6 |
| Computer simulation | 15,3 |
| Social media groups | 8,4 |
| We don't use any | 8 |
| Newsletter | 8 |
| E-book | 7,4 |

The 2025 survey confirms that online learning platforms are again the most preferred asynchronous learning tool, with half of respondents selecting them. Companies increasingly invest in structured digital ecosystems that provide interactive courses, progress tracking, and self-paced learning while ensuring standardization and scalability. E-learning content remains a strong choice for the same amount of companies, reinforcing the demand for structured, trackable inhouse learning modules.

Video, while still widely used, has lost some dominance. Organizations are focusing more on interactive and engagement-driven learning rather than passive content consumption. Mobile apps are the only real winners compared to the 2024 results with almost 20% of use.

Podcasts have gained traction as employees seek flexible, audio-based learning formats as well.

Meanwhile, e-books and newsletters are declining in popularity as people prefer more engaging digital formats.

## THE CHALLENGE:
## LOW COMPLETION RATES AND
## THE ILLUSION OF LEARNING

Despite their popularity, online learning platforms face engagement challenges, with many learners failing to complete courses. Several studies have highlighted that learners often enroll in online courses but do not fully engage with the available content or complete the sessions. For instance, research indicates that Open Online Courses have an average completion rate of approximately 15%, with platforms like Coursera reporting even lower rates, ranging between 7% and 9%.

However, even when participants complete sessions, the challenge extends to implementing the learned skills in real work environments. Without structured follow-up, practical application, and managerial support, much of the acquired knowledge remains unused, limiting the true impact of online learning.

This creates an "illusion of learning," where organizations assume training is effective simply because content is available for all. Companies must integrate blended approaches with reinforcement strategies to drive meaningful learning outcomes.

> *COVID brought video-based online content to us as well — and the initial enthusiasm has already faded. It's certainly possible to make it work well, but we'd really like to know how to do it effectively.*

## DEVELOR'S APPROACH:
## INTEGRATING DIGITAL TOOLS
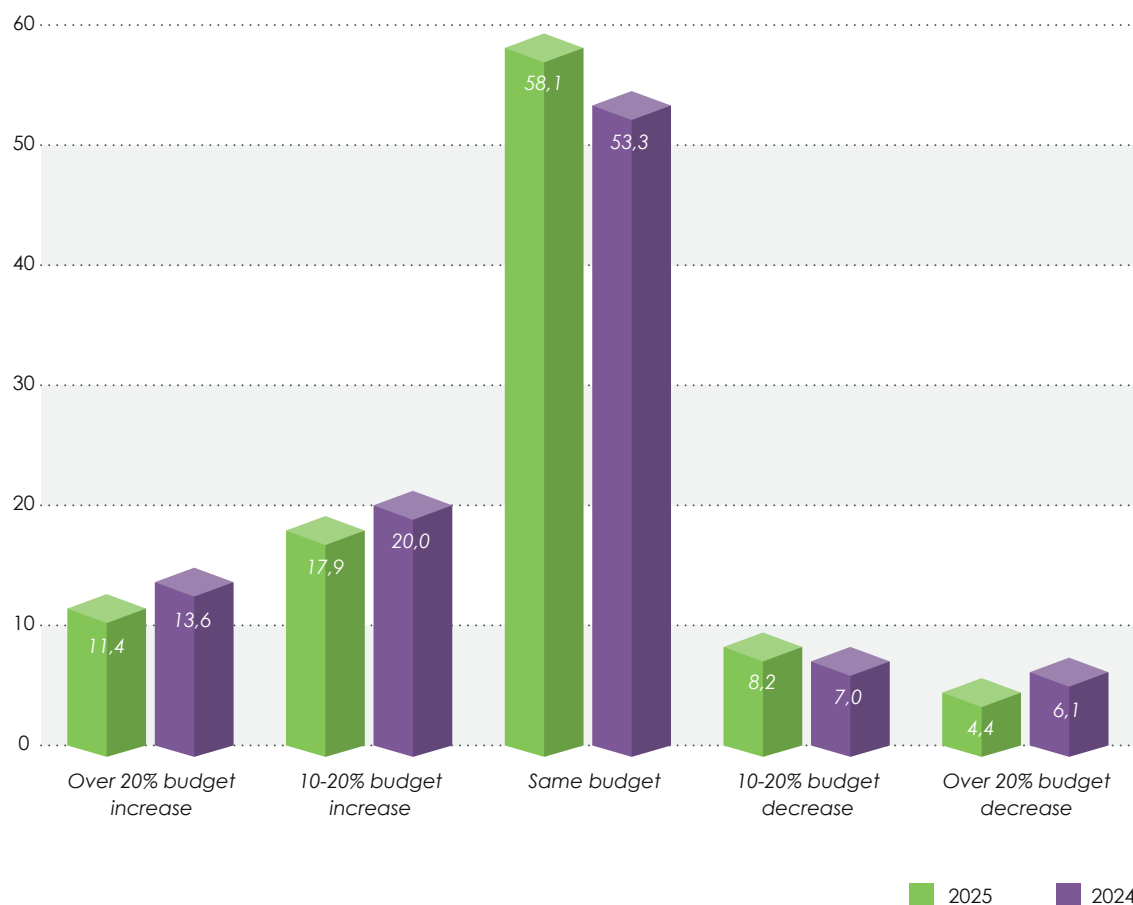## INTO COMPLEX DEVELOPMENT
## PROGRAMS

DEVELOR strategically incorporates digital tools to maximize engagement and effectiveness. The SC Training mobile app supports follow-up training with bite-sized lessons, interactive exercises, worth reading recommendations, reinforcing theories over time.

As an other example the TrueManager leadership simulation enables leaders to practice decision-making in realistic business scenarios, bridging the gap between theory and real-world application.

Video content also plays a key role in our courses, first of all in story- and game-based learning, introducing characters and scenarios in an engaging way that grabs attention and enhances knowledge retention.

# TRAINING BUDGETS IN 2025: STAGNATION WITH SIGNS OF GROWTH

## TRAINING BUDGET CHANGE IN 2025 VS 2024



Legend: 2025 (green), 2024 (purple)

Data:
- Over 20% budget increase: 2025 = 11,4; 2024 = 13,6
- 10-20% budget increase: 2025 = 17,9; 2024 = 20,0
- Same budget: 2025 = 58,1; 2024 = 53,3
- 10-20% budget decrease: 2025 = 8,2; 2024 = 7,0
- Over 20% budget decrease: 2025 = 4,4; 2024 = 6,1

The 2025 survey results indicate that most organizations are keeping their training budgets at similar levels as in 2024, with nearly 60% of respondents reporting no change. This suggests a period of stagnation rather than significant growth or decline, as companies face economic uncertainties while maintaining learning and development initiatives.

While stagnation is the dominant trend, around 29% plan to increase their training budgets, with 11% forecasting an increase of more than 20 % which is significant growth. This demonstrates that some companies still see learning and development as a critical investment area, prioritizing leadership programs, and workforce upskilling despite financial challenges.

On the other hand, 1 out of 10 expect budget reductions, with a small fraction planning cuts of over 20 %. While these reductions are not widespread, they highlight that certain industries are under financial strain, forcing organizations to scale back training expenditures.

## WHAT THIS MEANS FOR TRAINING PROVIDERS AND CORPORATE LEARNING TEAMS

### FOR TRAINING PROVIDERS

These findings suggest a competitive environment where learning budgets are not growing significantly, but companies still require effective learning solutions. Providers will need to offer cost-efficient, high-impact programs that demonstrate measurable results, ensuring they align with business priorities. Blended learning, modular programs, and digital transformation training may be key areas of focus.
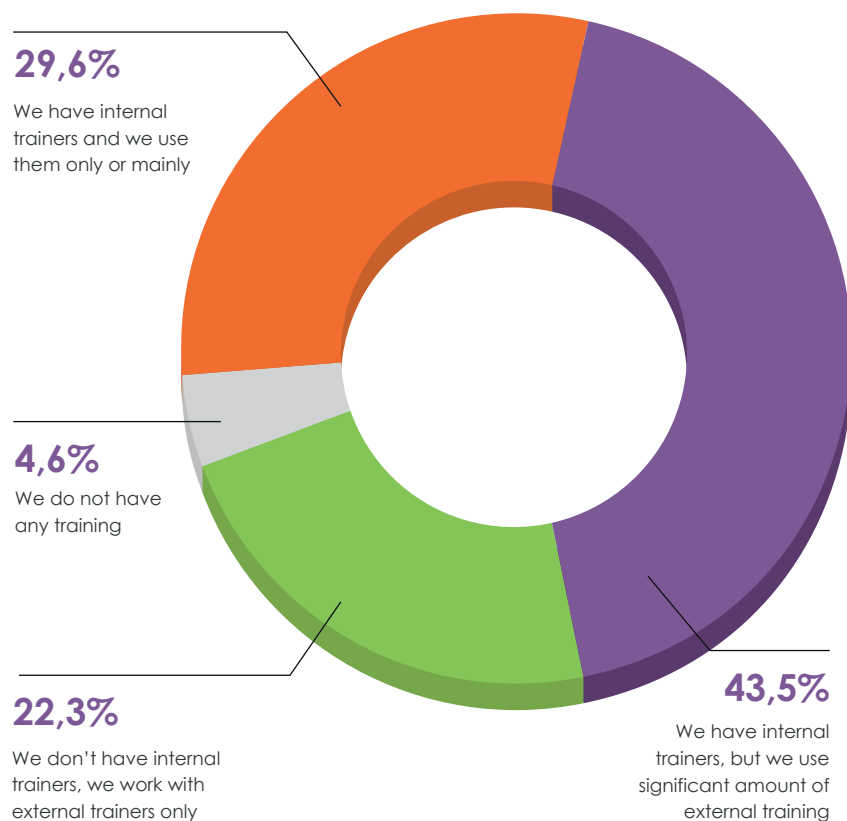
### FOR CORPORATE LEARNING TEAMS

Stagnating budgets mean that strategic prioritization is essential. Organizations must allocate resources to the most impactful training areas, ensuring that leadership development, upskilling, and AI-driven learning remain central. Companies facing budget reductions may need to optimize training programs through blended learning models, internal knowledge-sharing, and cost-effective digital tools to maintain development opportunities despite financial constraints.

The results confirm that while training investments are not declining drastically, there is little momentum for growth, making it essential for learning and development leaders to maximize efficiency, justify spending, and ensure learning initiatives deliver tangible business value.
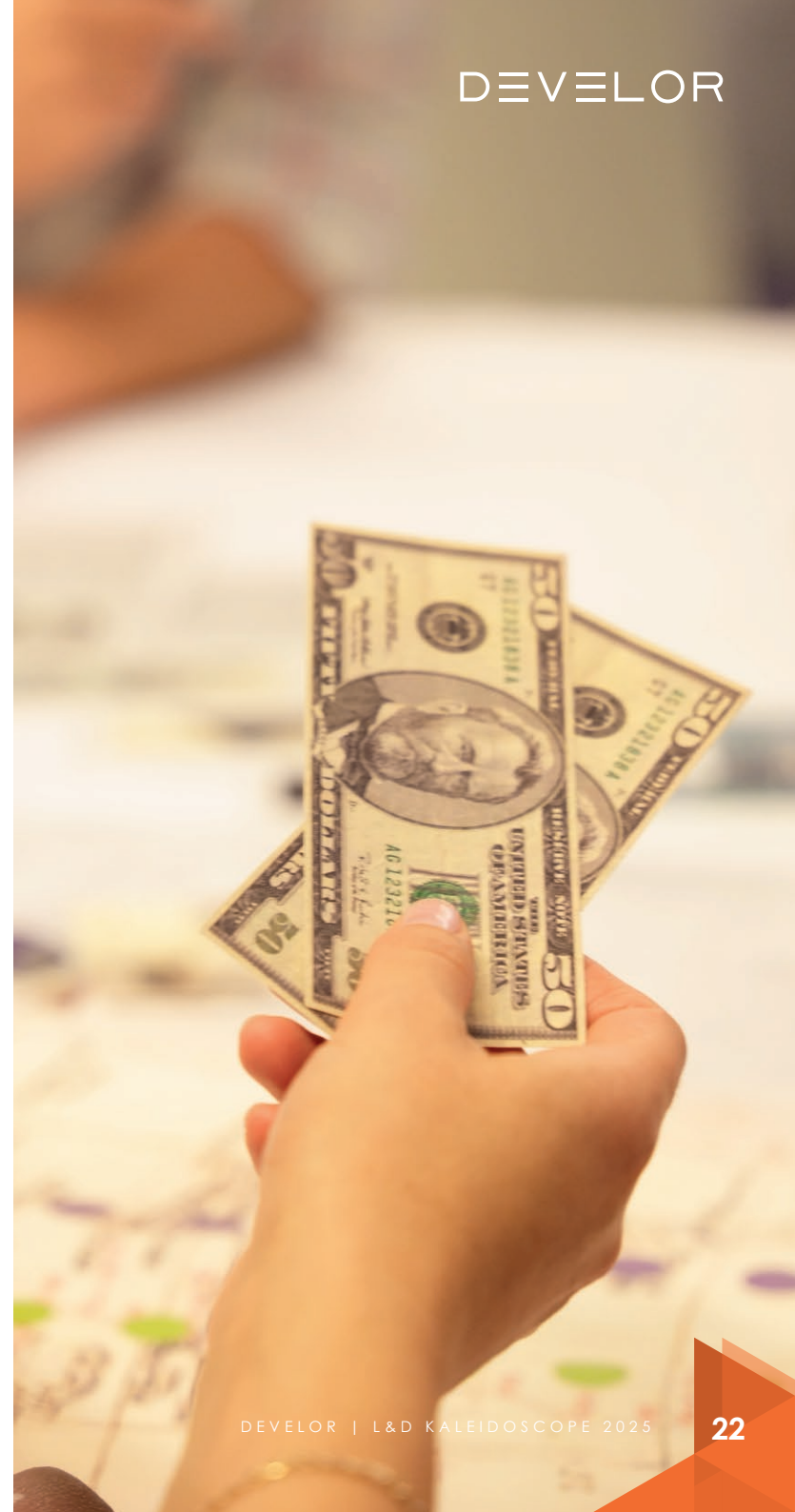
# USE OF TRAINERS IN 2025: BALANCING IN-HOUSE AND EXTERNAL EXPERTISE

## THE USE OF INTERNAL AND EXTERNAL TRAINERS



**29,6%**
We have internal trainers and we use them only or mainly

**4,6%**
We do not have any training

**22,3%**
We don't have internal trainers, we work with external trainers only

**43,5%**
We have internal trainers, but we use significant amount of external training

We have learned from the responses that most companies rely on a combination of internal and external trainers, with 43.5% of respondents stating that they have internal trainers but also make significant use of external providers. This suggests that organizations recognize the value of both cost-effective internal knowledge transfer and the specialized expertise of external trainers. However, in most cases, internal and external trainers work separately, limiting the potential for collaboration that could create a bigger impact. A stronger synergy between internal and external trainers could lead to richer, more dynamic training programs that combine organizational knowledge with fresh know-how.

External trainers can also create healthy competition for internal trainers, motivating them to improve their own delivery, update their knowledge, and adopt new learning techniques.
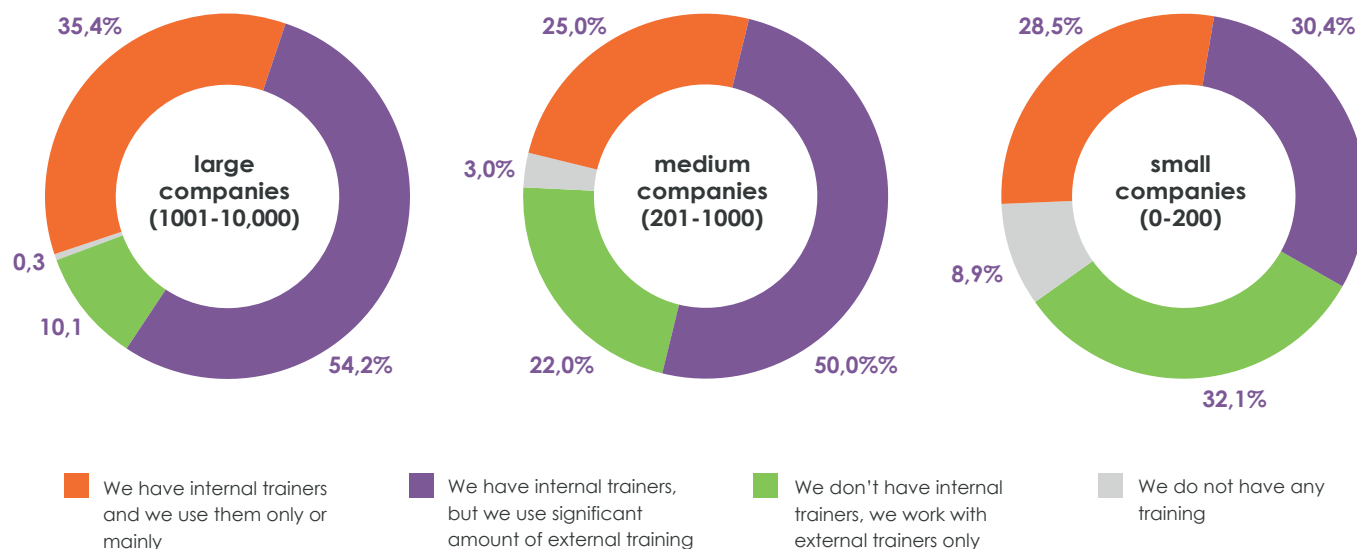
Around 30 % of companies use internal trainers as their primary training resource, indicating a strong preference for in-house development, particularly in industries where company-specific knowledge is critical. While this approach can be cost-effective and tailored, it also comes with risks. Relying solely on internal trainers may lead to complacency, outdated training methods, and a lack of fresh know-how.

Approximately 22 % of companies rely entirely on external trainers, which may reflect a focus on specialized skills, leadership development, and technical expertise that internal teams may not provide. External trainers bring new methodologies, industry trends, and best practices that keep training programs relevant and engaging.

# WHEN IT COMES TO INTERNAL TRAINERS, COMPANY SIZE MAKES A DIFFERENCE

It's worth taking a closer look at company sizes, as the results vary significantly. How well does this align with your current practice? Are there any planned changes for 2025?

## INTERNAL VS EXTERNAL TRAINERS



**large companies (1001-10,000)**
- 35,4%
- 0,3
- 10,1
- 54,2%

**medium companies (201-1000)**
- 25,0%
- 3,0%
- 22,0%
- 50,0%%

**small companies (0-200)**
- 28,5%
- 30,4%
- 8,9%
- 32,1%

Legend:
- 🟧 We have internal trainers and we use them only or mainly
- 🟪 We have internal trainers, but we use significant amount of external training
- 🟩 We don't have internal trainers, we work with external trainers only
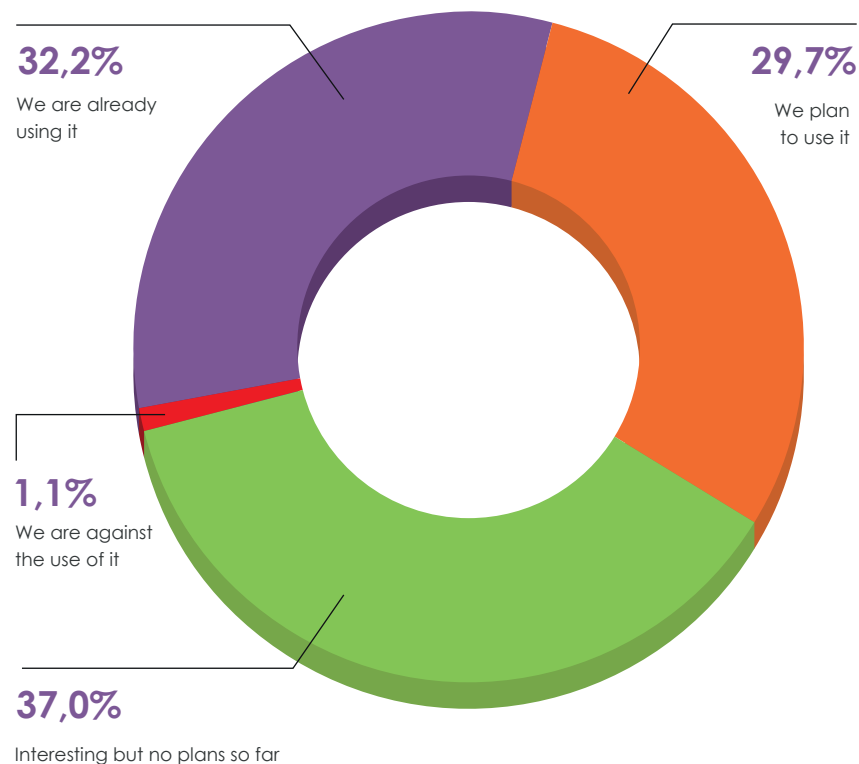- ⬜ We do not have any training

The 2025 results show only minor shifts compared to 2024. The percentage of companies using both internal and external trainers remains nearly the same, while reliance on internal trainers alone has slightly decreased. Companies continue to recognize the benefits of external expertise, but collaboration between internal and external trainers is still limited. The need for better integration and shared learning remains an opportunity for many organizations.

These findings suggest that while internal trainers remain a key part of corporate learning strategies, organizations increasingly see external expertise as essential for ensuring high-quality, specialized training programs. A balanced approach, where internal and external trainers collaborate, could significantly enhance the impact of training initiatives by blending company-specific knowledge with external innovation and best practices.

# AI IN L&D: INTEREST GROWS,
# BUT IMPLEMENTATION REMAINS SLOW

## THE ROLE OF AI IN L&D



**32,2%**
We are already
using it

**29,7%**
We plan
to use it

**1,1%**
We are against
the use of it

**37,0%**
Interesting but no plans so far

There is a fast breakthrough and growing interest in artificial intelligence within corporate learning and development, yet full-scale implementation remains limited. While some organizations have already integrated AI into their training programs, many are still in an exploratory phase, and a notable portion remains hesitant about its adoption.

Around one-third of respondents state they are already using AI in their learning and development strategies, leveraging it for personalized learning paths, automated content, and data-driven insights. Another 30 % indicate plans to implement AI, showing that organizations recognize its potential but may still be in the research or early adoption phase.

However, the largest group – nearly 37% – find AI interesting but have no plans to use it yet. This suggests that while AI is acknowledged as a valuable tool, many organizations lack the necessary infrastructure, expertise, or confidence to integrate it effectively. Only about 1 % of respondents state they are against AI in L&D, indicating that resistance to the technology is minimal.

## THE PATH FORWARD: BALANCING AI WITH HUMAN-LED LEARNING

The survey highlights the importance of balancing technology with human interaction. While AI can enhance personalization, streamline training processes, and improve efficiency, it is not yet positioned to replace traditional learning experiences.

For AI adoption to accelerate, organizations need clearer strategies, better integration with learning systems, and a stronger focus on upskilling HR and L&D professionals to work alongside AI-driven solutions. Companies that blend AI-powered tools with human expertise will be best positioned to maximize both efficiency and engagement in training programs.

> *We always overestimate the change that will occur in the next two years and underestimate the change that will occur in the next ten.*
>
> *Bill Gates*

This quote perfectly describes AI in HR. In the short term, we expect quick wins in areas like recruitment or learning, but results may fall short due to data or adoption challenges. In the long term, though, AI could transform HR with smarter decisions and more efficient processes. The message: AI isn't instant magic, but starting now sets us up for future success.

## DEVELOR'S MISSION AND ACTIVE ROLE IN AI TRAINING

DEVELOR began integrating AI into its operations and training portfolio in the autumn of 2023, aiming to shift mindsets from viewing AI as a threat to recognizing its potential as an opportunity. This mission led to the popularity of DEVELOR's AI Mindset training, designed to help employees develop a confident and practical approach to AI. Additionally, AI in Sales and AI in Leadership courses have been introduced to support business leaders and sales teams in effectively utilizing AI tools in their daily work. These programs focus on real-world applications, ensuring participants can leverage AI for better decision-making and productivity.

HR also plays a key role in this transformation. As AI adoption grows, HR teams are responsible for leading the mindset shift and ensuring employees see AI as an enabler rather than a disruptor. By supporting employees in developing AI-related competencies and fostering an open approach to technological advancements, HR can create an organizational culture that is ready for the future.

# CLOSING THOUGHTS FROM OUR GLOBAL CEO

## THE FUTURE OF LEARNING: A BALANCE OF TECHNOLOGY AND HUMAN CONNECTION

The L&D Kaleidoscope 2025 Survey highlights key trends shaping corporate learning: a growing demand for personalized learning experiences, the continued evolution of digitalization, and the integration of artificial intelligence. These developments reflect the ongoing transformation in training methods, aligning with findings from earlier sections on training budgets, asynchronous learning, and internal trainer usage. However, soft skills, leadership, and mentorship remain equally vital in ensuring well-rounded employee development.

The role of artificial intelligence in training is expanding, with AI-driven tools assisting in customizing learning experiences and automating administrative processes. While companies are incorporating AI into their strategies, its full potential is still being explored, particularly in finding the right balance between automation and human-led instruction.

Digitalization continues to influence learning formats, with e-learning platforms, mobile learning, and webinars playing a significant role. However, organizations must ensure that essential skills, such as communication, leadership, and critical thinking, are not overlooked in favor of fully automated training. While online learning offers flexibility, it cannot replace the value of human interaction in knowledge transfer and professional growth.

Personalized learning experiences are becoming a necessity. Employees seek training that aligns with their career paths, learning preferences, and daily responsibilities. Companies investing in modular learning formats and mentoring programs provide more relevant opportunities for skill development, improving both engagement and practical application. Alongside digital advancements, organizations continue to recognize the importance of soft skills, leadership, and mentorship. Developing communication, critical thinking, and empathetic leadership is critical, and peer learning and mentoring programs enhance collaboration and knowledge-sharing in ways that digital tools cannot replicate.

The preference for shorter, flexible training formats ties into the rise of AI and digital learning, but companies still rely on human-led development programs to foster leadership and engagement. While not seeing major growth, training budgets are being reallocated toward a blend of digital and instructor-led learning to balance efficiency with meaningful interaction.

> Looking ahead, companies that are in digital transformation while maintaining strong leadership development and mentorship initiatives will be best positioned to meet evolving workforce expectations, improve learning retention, and create a culture of continuous development.

Feel free to share the study with others, whether inside your company or in the HR profession. And as you've come to expect, we eagerly await your feedback and suggestions.

Thanks for the time you've dedicated to our research.

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