LEARNING AND DEVELOPMENT

Global Sentiment Survey 2024

In association with

By Donald H Taylor

Foreword

The unsurprising survey

It is no surprise that this year's L&D Global Sentiment Survey was topped by Artificial Intelligence. AI is no longer a specialist area. Since the launch of Chat GPT in November 2022, the deluge of news, interest and opinions around AI has been inescapable. The survey has one obligatory question: "What will be hot in workplace L&D in 2024?" There could be only one answer.

Two things, however, did surprise in analysing responses to the four-question survey: the sheer extent of the support for AI and also the ambivalence towards it. AI dominated voting in every region and area of work. The vote share of 21.5% on the final table for the top option was an unprecedented 9.5% higher than the previous year.

At the same time, when asked to describe their greatest challenge in workplace L&D this year, more people used the term AI and its derivatives than any other.

In the 11 years of the survey no option has come close to these numbers for what is hot, and none has simultaneously topped the table for being hot while simultaneously being what respondents were most concerned about. In this report, we explore what this explosion of feeling might mean for the use of AI in L&D, and for the profession itself.

Inevitably, this huge interest in AI reduced the share of the vote for other options. Almost every one of the 16 options on the main question attracting a lower share of the vote than last year. Two options, however, did also manage to increase their share of the vote – Personalization/adaptive delivery and Learning analytics. Together with the vote for AI, this suggests that the trend of interest in data, first noted in 2020 and which returned last year, is no temporary blip.

In contrast, interest in collaborative learning and coaching, which surged during the pandemic, continued to fall this year. If maintained in future surveys, these trends could indicate a fundamental shift in how the L&D profession sees itself and its role – shifting from the personal to the technical.

Many readers use this report to stimulate discussion in their L&D teams. To help with that, this year's report also includes suggested questions to consider. Whether reading alone or with others, we hope these will provoke reflection and further thinking.

As always, the results of the survey must be treated with caution. This survey is about sentiment, about feelings. Those feelings – however firmly held – neither prove nor disprove the idea that AI will take over L&D. Once again, we have included in this report a section on interpretation to stress where the survey can provide value, as well as indicating its limits. Please do read this section and approach claims made based on the survey results with informed caution.

As always, I must end by thanking our sponsors. Without OpenSesame, Speexx, Netex, Learning Pool, getAbstract and Lexonis, this survey would not have been possible.

Donald H Taylor
London, UK
February 2024

Content

The questions

The L&D Global Sentiment Survey (GSS) has run annually since 2014, with voters invited to participate via a combination of email, social media and online. The 2024 survey ran for 59 days, from 6 December 2023 to 2 February 2024, with one obligatory question:

'What will be hot in workplace L&D in 2024?'

There were also three optional questions:

Q2 - In what country do you work? *Multiple-choice, answered by 97% of respondents.*

Q3 - What is your biggest L&D challenge in 2024? *Free text, answered by 94% of respondents.*

Q4 - Which of these best describes where you do most of your work? *Multiple-choice, answered by 99% of respondents.*

The details

- Respondents were asked to vote for what *would* be hot, not what *should* be.
- Respondents chose up to three options from a randomized list.
- There were 15 options, plus 'Other'.
- Options were not defined, neither was the question.
- To understand more about each option, see page 23 for a *definitions list.*
- For *caveats* around the methodology, see page 22.

The options

- Artificial intelligence
- Coaching/mentoring
- Cohort-based learning*
- Collaborative/social learning
- Consulting more deeply with the business
- Learning analytics
- Learning experience platforms
- Micro learning
- Performance support
- Personalization/adaptive delivery
- Reskilling/upskilling
- Showing value
- Skills-based talent management
- The Metaverse
- Virtual and augmented reality
- Other

*** New in 2024**

Methodology

Aims

The L&D Global Sentiment Survey is an annual check on how L&D practitioners feel about the year ahead.

That is why the survey is designed to be answered quickly, with just one obligatory question, unchanged each year, which can be read and answered rapidly and instinctively. In 2024, just over 50% of respondents completed the survey in two minutes or less.

Why focus on something as intangible as sentiment, rather than something more concrete, such as plans for the following year? Partly because other surveys do that, but mostly because the aim of the survey is to understand the likely direction of L&D in three or four years' time.

Participants

Participation comes from a self-selecting sub-group of the L&D community, the people comfortable with technology and enthusiastic about sharing their ideas. Because of this, we assume they are on the left side of the Everett Rogers Diffusion of Innovation Curve. It's likely they are Innovators and Early Adopters. The survey's results over the years support this; ideas which were initially 'hot' and highly placed often become more widely adopted subsequently.

Not every new idea that achieves popularity on the left of the curve goes on to be more widely adopted. But every methodology and technology which is eventually adopted widely was once considered 'hot' by a small group of innovators. This report aims to understand which of these 'hot' ideas has the potential for wider adoption.

Data collection

Votes were solicited by a social media campaign LinkedIn and by email. Slightly over a third of votes are collected directly by the survey organisers, the remainder through sponsors and two types of partners. The contacts reached by media partners are widely spread, while those of regional partners are focused on a particular geography.

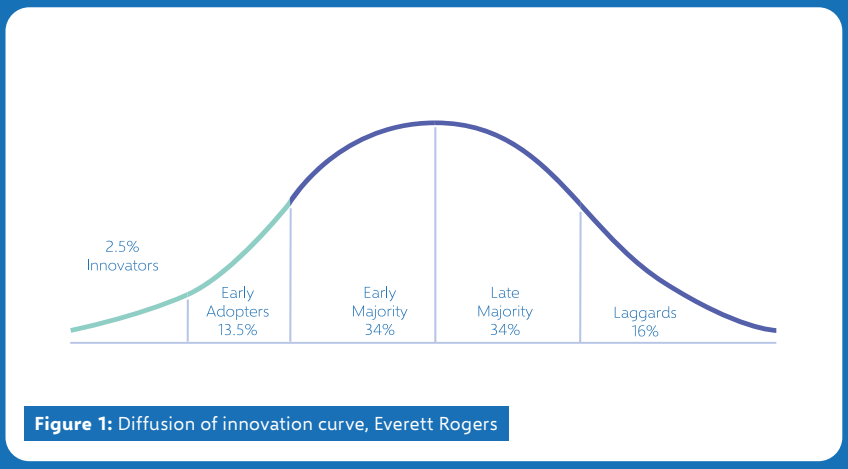

Figure 1: Diffusion of innovation curve, Everett Rogers

The options

There are 15 options on the table plus 'Other'. Since 2020, one has been retired each year (almost always the one in position 15) and one added. This year, Mobile delivery was retired from the list, having topped the first poll in 2014, and Cohort-based learning added. None of the questions nor the options are defined. Five versions of the survey were run: the main survey in English, as well as surveys with the questions and options in Thai, Indonesian and Mandarin combined with English, and one survey purely in French.

Voting patterns

Respondents can vote for up to three options, with 94% choosing three options. Just 2% of respondents voted for a single option.

For guidance in how to interpret the survey, see Interpretation, on the next page, and please bear in mind the *Caveats* section.

Interpretation

The GSS is the only data set we have that examines L&D sentiment at scale over a protracted period. Like all surveys, there are limits to its interpretation.

What does the survey show?

The survey's main question, 'What will be hot in workplace L&D in 2024?', does not show L&D's plans for 2024. It shows what L&D people are excited about at the beginning of the year. With the addition of some context and understanding of how new ideas are adopted, we can use this information to explore how this excitement may turn into action in a few years' time.

The optional question, 'What is your biggest L&D challenge in 2024?', shows people's concerns at the start of the year. It does not tell us the severity of these challenges.

Caveats

A full page of *Caveats* always appears towards the end of the annual report. Here are the five key caveats to bear in mind when reading further:

- Respondents are largely unqualified – we do not know who they are.
- Respondents are likely to be more tech-savvy than the general L&D population.
- Year-on-year comparisons may be unsound because we do not revisit an unchanging cohort.
- Respondents may not share the same understanding of the survey's wording.
- Key individuals/organisations may skew results from some countries.

Our surveyed population

Data for this survey is not collected as rigorously as it is for political surveys, which aim to accurately represent a cross-section of a country's adult population across age, background and other demographics. In contrast, our voting population is entirely self-selecting and is likely to be skewed towards one part of the L&D community: enthusiasts and early adopters. As explained in Aims and methodology, this is not a bad thing. We are interested in exactly what these people think, as an indicator of what trends may develop in the future.

However, there is a chance that this group is operating in an echo chamber reinforcing loudly voiced opinions. As a community that is well connected to social media channels, it is likely that at least part of the population we survey is heavily exposed to a narrow range of claims about workplace learning and learning technologies. This homogenous view will not represent the wider views of the L&D community.

Context is crucial

Without context, this survey would simply be a list of data points. We would see both Curation and Mobile delivery descending in importance over the years and be unable to distinguish between them. Our understanding of what is happening in L&D, informed by daily conversations and reading, lets us know that Curation is a great idea only occasionally implemented, while Mobile delivery is widespread. It is essential to apply this context to the data.

Often this context is location-specific, and we thank the country partners and sponsors who take the time to talk over the results with us, and who assemble smart people the world over to discuss the results. There is no substitute for hearing what these table and graphs mean to the people doing the work on the ground.

How is the survey useful?

We believe that the primary role of the survey is to stimulate thinking and ask the reader to think about the implications of the data, rather than simply accepting it at face value. One key question this year is: 'Can this high level of interest in AI be maintained?' Whether it can or cannot, there are important implications that we should consider, which we hope will be prompted by the questions posed in this report.

Who voted?

A worldwide view

Respondents are invited to vote via email and social media (largely LinkedIn) and by direct messaging on LinkedIn.

3,270 people from 97 countries voted in this year's survey, 18% fewer than last year, spread across nine regions.

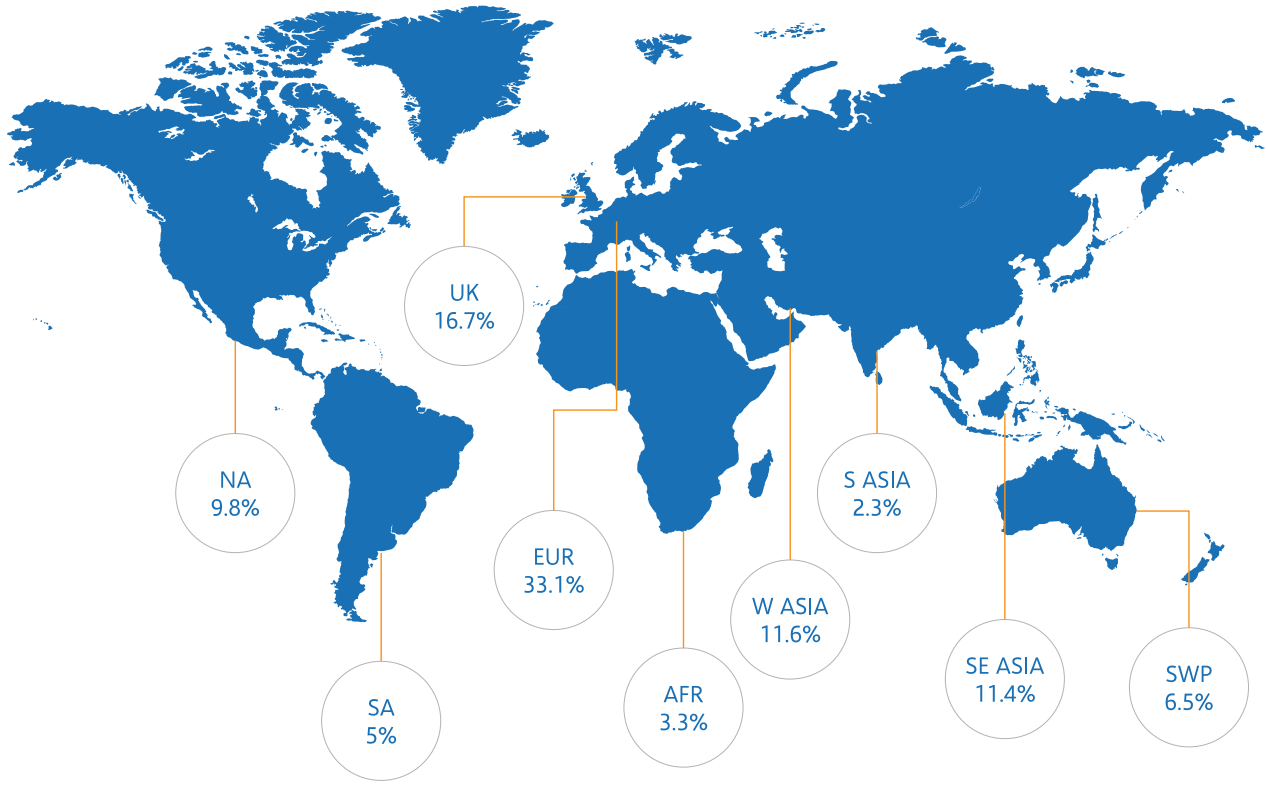

Figure 2: Distribution of votes worldwide

99% of voters chose to answer the question
'Which of these best describes where you do most of your work?'

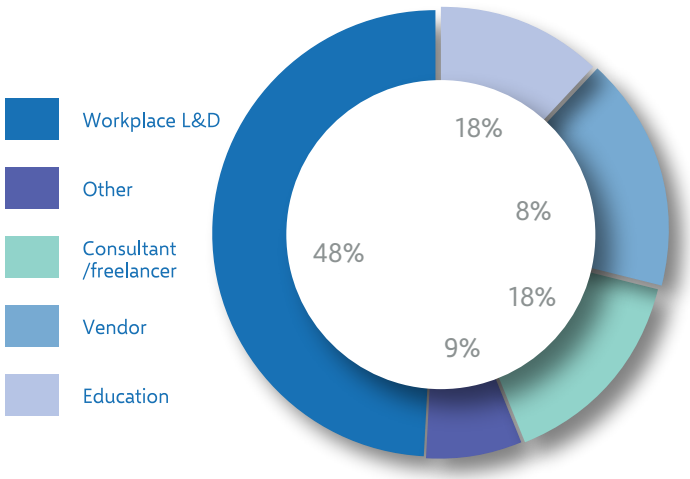

Figure 3: Where respondents work

Key countries

There are 16 countries in which at least 85 people voted:

United Kingdom	545	Israel	140
United States	256	Malaysia	108
Türkiye	201	Germany	99
Ireland	171	Indonesia	97
Brazil	146	Poland	94
Thailand	142	Sweden	91
Australia	141	Italy	90
Netherlands	141	Spain	87

Figure 4: Key countries

The results

One story overshadows everything else in this year's results. Two other trends lie hidden in the data.

- Artificial intelligence dominates
- Data returns
- Skills consolidate

Artificial intelligence (AI) runs through every part of this year's results. Given the attention that has surrounded AI since the launch of ChatGPT in November 2022, this comes as no surprise. Indeed, the question which we use to attract voters – What will be hot in workplace learning in 2024? – may have seemed redundant. For the first time, fewer voters (3,270) participated than the previous year (3,996). For more on the implications of this explosive rise in interest in this technology, see *The fall and rise of AI* on page 12.

Apart from AI, only two other options collected a greater share of the vote this year: Personalization/adaptive delivery and Learning analytics. The vote for Skills-based talent management fell only slightly. The resilience of support for these technologies contrasts with that for coaching and collaboration, which fell this year. We explore this contrast further in *A new data focus* on page 15.

For the first time in three years, Reskilling/upskilling no longer tops the table. But it has only fallen to second position and Skills-based talent management remains at number 3. Between them, the two options total almost 20%, a substantial vote of support for the Skills-based organisation.

GSS 2024		Δ%
1. Artificial intelligence (2)	21.5%	↑
2. Reskilling/upskilling (1)	11.0%	↓
3. Skills-based talent management (3)	8.9%	↓
4. Personalization/adaptive delivery (6)	8.1%	↑
5. Learning analytics (4)	7.8%	↑
6. Coaching/mentoring (7)	5.9%	↓
7. Collaborative/social learning (5)	5.8%	↓
8. Micro learning (10)	5.8%	↓
9. Consulting more deeply with the business (8)	5.4%	↓
10. Showing value (9)	5.0%	↓
11. Learning experience platforms (11)	4.3%	↓
12. Virtual and augmented reality (13)	3.3%	↓
13. Performance support (12)	3.3%	↓
14. The Metaverse (14)	1.6%	↓
15. Cohort-based learning (new)	1.6%	new
16. Other (16)	0.8%	↓
n = 3,270		

The figures in brackets show previous year's ranking

Figure 5: Main results table for GSS 2024

"AI's success in the survey this year comes as no surprise"

Key takeaways

AI dominates sentiment in L&D

By any measure, this year's interest in AI is unprecedented. At 21.5%, the share of the overall vote is the highest in the 11-year history of the survey. Previously, no vote had topped 13%. Figure 6 shows the votes for the #1 option since 2016, when we adopted the current format of a list of 16 options.

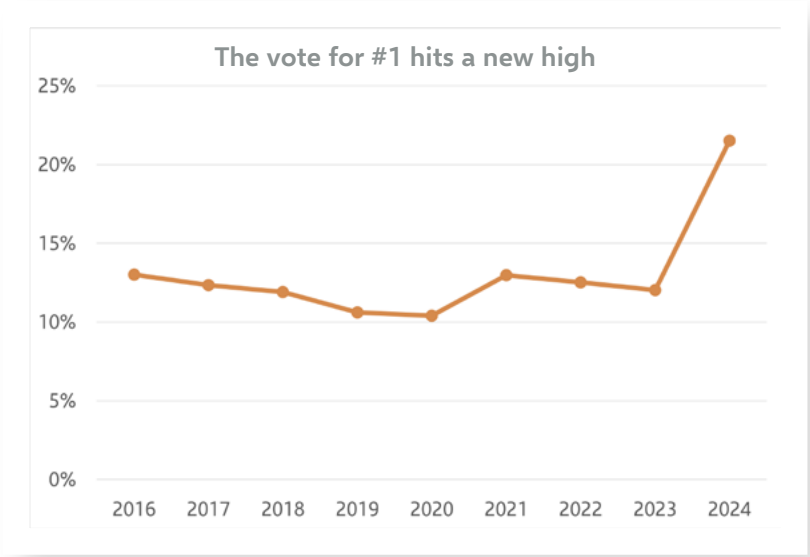

Figure 6: Share of vote for the top option on the survey

All but one of the 16 key countries placed AI first. Thailand placed it second (for a list of key countries, see page 6). AI also topped the preferences of each of the five work groups (see Figure 7), with votes exceeding 20%.

AI has been surrounded by both hype and alarmism, and L&D must work to understand what is possible and what is not when using this technology. For more on L&D's approach to AI, see *The fall and rise of AI* on page 12.

Everyone loves AI this year

Workplace L&D	20.3%
Consultant/freelancer	21.8%
Vendor	23.1%
Education	24.0%
Other	22.6%

Figure 7: Vote for Artificial Intelligence across work groups

"Everyone loves AI ... for the moment."

Data is now seen as integral to L&D

Apart from AI, only two other options rose up the table this year: Personalization/adaptive delivery and Learning analytics, while the vote for Skills-based talent management fell only slightly. The resilience of support for these data-focused approaches contrasts with the collapse of votes for both coaching and collaboration. We explore this contrast further in *A new data focus* on page 15.

In the 2020 GSS report we noted that data was dominating L&D's thinking. That seems even truer today. Three of the top five from the 2020 table are in this year's top five. Collaborative/social learning and Learning experience platforms have been replaced with Reskilling/upskilling and Skills-based talent management. Following the surge in interest in people-focused options during the pandemic, there is no doubt that data is back, and for our respondents, an integral part of L&D.

GSS 2020	
Learning analytics	10.4%
Personalization/adaptive delivery	9.8%
Collaborative/social learning	8.3%
Learning experience platforms	7.8%
Artificial intelligence	7.7%

GSS 2024	
Artificial intelligence	21.5%
Reskilling/upskilling	11.0%
Skills-based talent management	8.9%
Personalization/adaptive delivery	8.1%
Learning analytics	7.8%

Figure 8: The top 5 of the GSS tables in 2020 and 2024

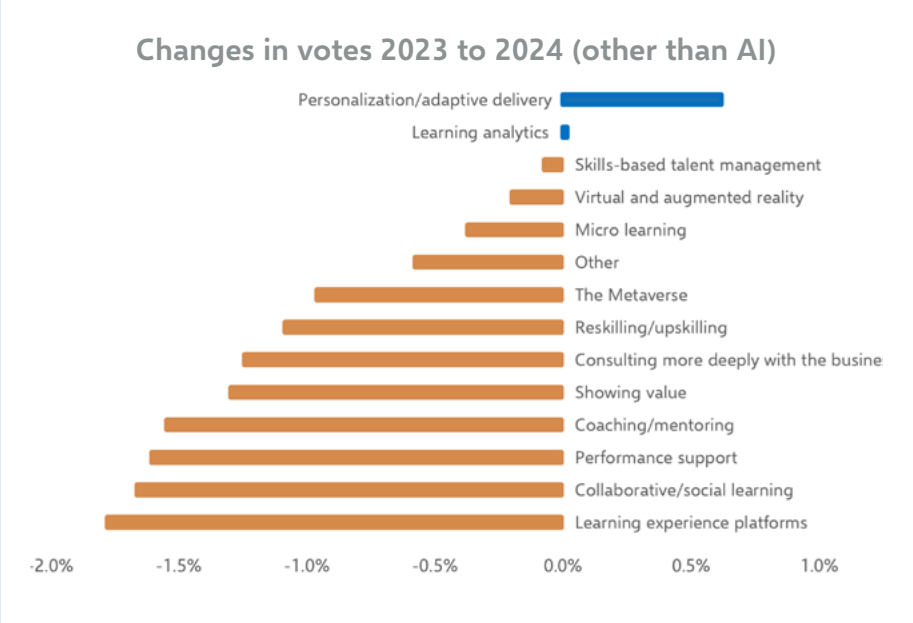

Figure 9: Changes in votes 2023-2024

The other impact of AI

Although most commentary in L&D is currently about AI, that doesn't mean that all other technologies have slipped from people's minds. Support for Virtual and augmented reality and Micro learning has fallen this year, but by far less than support for Learning experience platforms (see Figure 9). There is more on sentiment towards different technologies in *Winners and losers* on page 16.

The view across workspaces

99% of respondents chose to answer the optional question: ***'Which of these best describes where you do most of your work?***

- Part of a workplace L&D team
- Consultant/freelancer
- Work for a supplier/vendor
- The education sector

GSS 2024 Workplace L&D	
1. Artificial intelligence	20.3%
2. Reskilling/upskilling	11.2%
3. Skills-based talent management	10.6%
4. Learning analytics	8.4%
5. Personalization/adaptive delivery	7.1%
6. Coaching/mentoring	6.6%
7. Consulting more deeply with the business	6.1%
8. Micro learning	5.6%
9. Collaborative/social learning	5.4%
10. Showing value	5.0%
11. Learning experience platforms	4.0%
12. Performance support	3.7%
13. Virtual and augmented reality	2.6%
14. Cohort-based learning	1.7%
15. The Metaverse	1.2%
16. Other	0.5%
n = 1,526, 49% of those responding	

GSS 2024 Consultant/freelancer	
1. Artificial intelligence	21.8%
2. Reskilling/upskilling	10.5%
3. Personalization/adaptive delivery	8.7%
4. Skills-based talent management	7.8%
5. Consulting more deeply with the business	6.8%
6. Learning analytics	6.4%
7. Collaborative/social learning	6.4%
8. Coaching/mentoring	5.7%
9. Showing value	5.7%
10. Micro learning	4.4%
11. Learning experience platforms	4.1%
12. Performance support	3.8%
13. Virtual and augmented reality	3.5%
14. The Metaverse	1.8%
15. Cohort-based learning	1.6%
16. Other	1.0%
n = 576, 19% of those responding	

GSS 2024 Vendor	
1. Artificial intelligence	23.1%
2. Personalization/adaptive delivery	10.5%
3. Reskilling/upskilling	8.8%
4. Learning analytics	8.7%
5. Skills-based talent management	8.0%
6. Showing value	7.4%
7. Collaborative/social learning	6.1%
8. Micro learning	6.1%
9. Coaching/mentoring	4.4%
10. Consulting more deeply with the business	4.1%
11. Learning experience platforms	4.1%
12. Performance support	2.7%
13. Virtual and augmented reality	2.6%
14. Cohort-based learning	1.3%
15. Other	1.1%
16. The Metaverse	0.9%
n = 246, 8% of those responding	

GSS 2024 Education	
1. Artificial intelligence	24.0%
2. Reskilling/upskilling	11.1%
3. Personalization/adaptive delivery	9.3%
4. Learning analytics	7.5%
5. Micro learning	7.3%
6. Collaborative/social learning	6.6%
7. Skills-based talent management	6.3%
8. Learning experience platforms	5.4%
9. Virtual and augmented reality	5.3%
10. Coaching/mentoring	5.2%
11. Showing value	3.1%
12. Consulting more deeply with the business	2.7%
13. The Metaverse	2.6%
14. Performance support	1.5%
15. Cohort-based learning	1.3%
16. Other	0.9%
n = 567, 18% of those responding	

Figure 10: Share of votes across workspaces

All work groups agreed on the importance of both AI and Reskilling/upskilling. Beyond that, opinions differed.

Coaching/mentoring

This is more highly thought of by workforce L&D than any other work group. Given this demand, it seems strange that freelancers are not more enthusiastic about the potential for delivering coaching. And given the strides that have already been made in supporting coaching with AI, it is even stranger that the vendors' vote is not higher, as there is a real opportunity here for scalable, AI-supported services that would straddle the line between coaching and performance support.

Learning analytics

Only the consultants/freelancers do not rate this option highly. It scores a lowly 6.4% with them. This seems perverse. They rank Consulting more deeply with the business a little higher, and as consultants and freelancers, we might hope they would see value here. But without data and analytics, what will they be consulting about? There may be an issue with the interpretation of the words used, but it does look as though consultants and vendors may be missing a potential opportunity.

Personalization/adaptive learning

It is unsurprising to see this highly ranked by educators, who value the idea of personalization, while being frustrated by the difficulties in attaining it in their sector. In contrast, workplace L&D score this option some 2% lower, despite it arguably being easier to personalize free of the restrictions of educational curricula. It is notable, however, that the highest score is taken by the vendors, who rightly sense a market need they can meet. Given the rise in popularity of this option in the results, it will be interesting to see offerings around personalization develop in 2024.

The global view

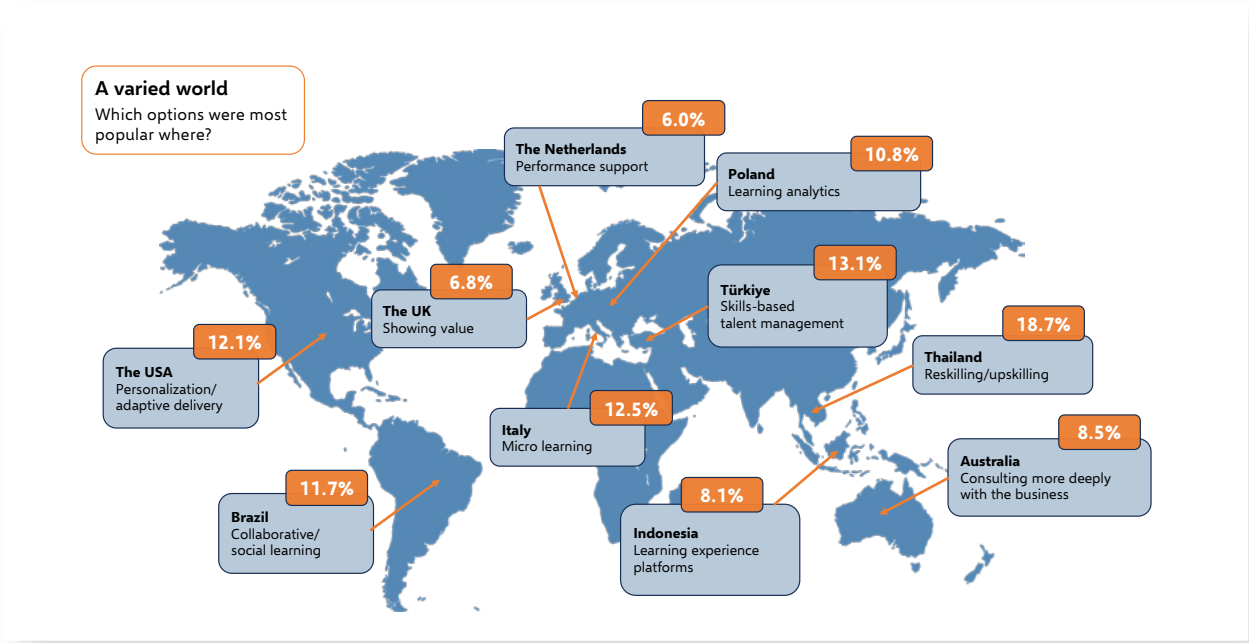

Figure 11: Highest votes for selected options in key countries

Despite the almost universal choice of AI as the number one choice as the hot L&D topic for 2024, the world is not a homogenous place. Here we look at the source of the largest votes for other options on the table among our key countries (for the *16 key countries* see page 6).

Reskilling/upskilling was the top choice in Thailand, the only key country not to rank AI first. Southeast Asia as a whole did not vote as keenly for AI as other regions did. It polled just 16% of the vote regionally, with every other region voting 20% or more.

A familiar north/south divide reasserted itself in the Americas, with the USA producing the highest vote for **Personalization/adaptive delivery** while Brazil backed **Collaborative/social learning** more than any other key country. These options have dominated voting in each of these countries since 2017 for the USA and 2021 for Brazil.

The enduring popularity of **Performance Support** in The Netherlands is almost certainly due to the personal influence of Alfred Remmits, who has driven support for this important topic locally and internationally for at least two decades. Similarly, Australia's support for **Consulting more deeply with the business** must be due at least in part to Michelle Ockers' passionate promotion of the need for L&D to take a strategic role.

Poland's voting has always leaned toward the technical. This year it had the highest vote among the key countries for **Learning analytics.** However, it was Türkiye that voted most heavily for the related option of **Skills-based talent management.**

Micro learning scored only 5.8% on the main table, but in Italy it attracted 12.5% of the vote, well ahead of the next highest vote, Spain's 8.2% and Indonesia's 8.1%

The fall and rise of AI

While the launch of ChatGPT on 30 November 2022 triggered the world's fascination with AI, interest had been growing before then. AI was introduced to the survey in 2017, and by 2021 had gone through the characteristic rise and fall shown by most options.

Initially, votes for options tend to increase annually. The options are chosen, after all, because they seem likely to increase in popularity. Then their popularity declines as they either move to mainstream adoption (as with Mobile delivery) or their novelty fades, and respondents' attention moves to other things, as happened with Curation.

Unusually, AI and VR&AR (Virtual and augmented reality), both introduced to the survey in 2017, broke with the normal downward trend and experienced a small increase in 2022. This was before the launch of Chat GPT (see Figure 12).

In 2023, VR&AR continued the expected decline of any survey option, but votes for AI took off, boosted by the launch of ChatGPT just before the 2023 survey opened in December 2022. The votes for AI continued rising into this year's survey.

This interest in AI went well beyond the world of L&D, fuelling commentary which in turn raised the profile of AI still further. In January 2024, Matt Bell of Google Labs in London plotted key topics mentioned in annual trends reports for three years. Crypto and Metaverse achieved around 2,000 mentions in 2022 and 2023. AI achieved slightly fewer mentions over the same period, but around 4,500 mentions in 2024, dwarfing all other trending topics.

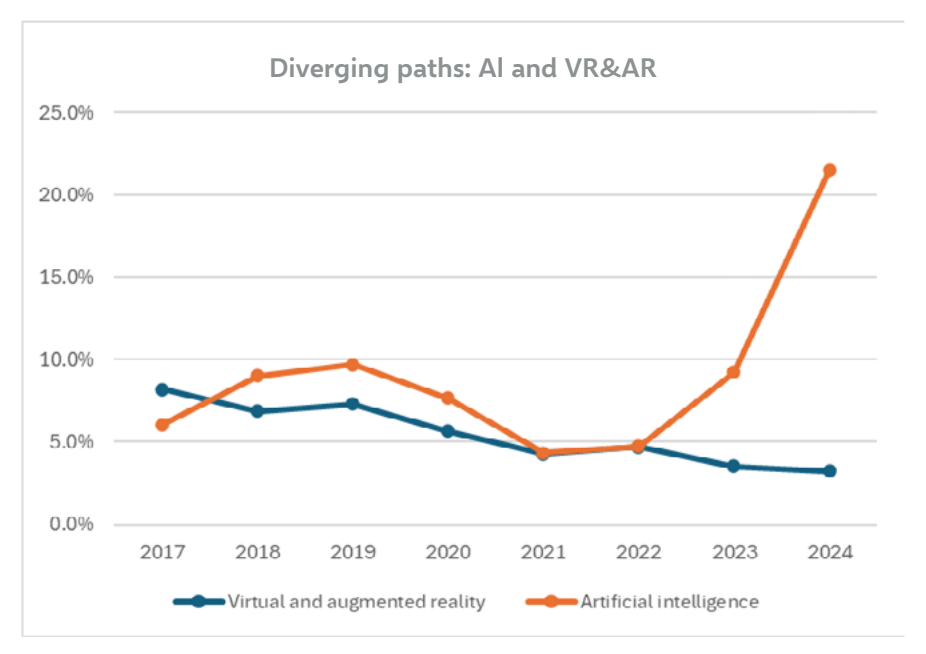

Figure 12: Votes for AI and VR&AR 2017-2024

Fact or fad?

Is this interest just a fad? If it is a fad, it is an enduring one. Figure 13 shows the Google Trends report for worldwide searches for the terms 'AI' and 'Crypto', both for two-year periods (31 January 2022 to 31 January 2024 for AI and 1 August 2020 to 1 August 2022 for Crypto). The Crypto line shows the peaks and troughs characteristic of a fad. While there are minor dips on the AI line, the trend remains resolutely upwards, two years after the launch of ChatGPT.

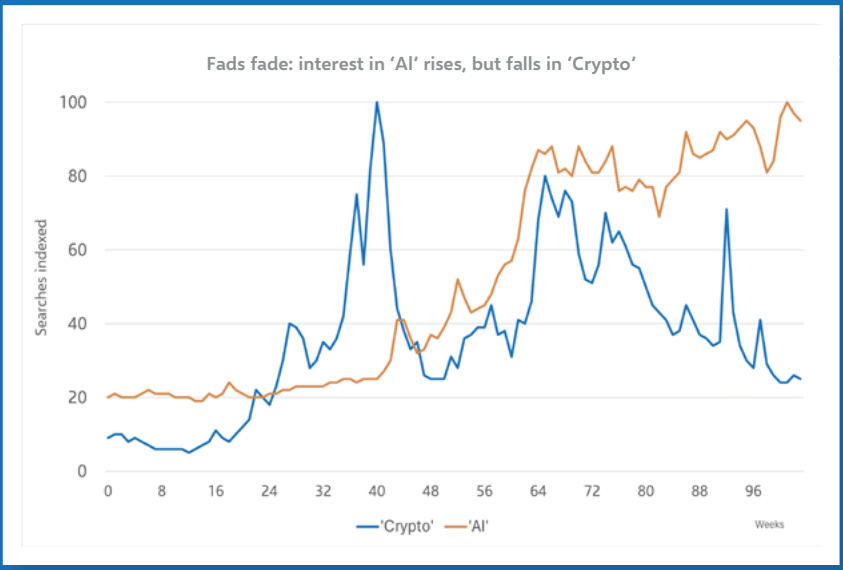

Figure 13: Google searches for 'AI' and 'Crypto' over two years

It is difficult to find a precedent for this level of sustained interest in any single topic in peacetime. It has been fuelled by a relentless outpouring of news, technical advances and raging opinion. Ethan Mollick, Associate Professor at The Wharton School, follows events in AI closely. In November 2023 he wrote 'I am an academic focused on this... and I barely keep up.'

And AI was not just for the academics. In 2023, it was inescapable. The UK's light-hearted Daily Star tabloid newspaper ran at least ten front pages over the year leading on Artificial Intelligence, usually portrayed as a robot, and often with evil intent. Headlines included 'Have killer machines taken over the world?', 'Attack of the psycho chatbots' and 'We're in a REAL mess'.

From interest to action

Sustained interest does not necessarily mean that anyone, whether in L&D or outside it, developed a sophisticated understanding of AI during the year. Arguably, AI was seen as a challenge as much as a benefit.

For the November 2023 GSS Focus report *AI in L&D: The State of Play,* we surveyed 185 L&D professionals about their use and expectations of AI. Of these, 111 were employers, the majority in the private sector. Even in this self-selecting group of respondents, 45% of the employers had only experimented with AI, or were just interested in it; they were not actively using it. And although AI has wide-ranging potential, when asked how they expected it to benefit them, respondents' two main predicted benefits were 'Creating content faster' and 'Improve efficiency/reduce costs within L&D'. For all the talk of skills inferencing using AI, fewer than 5% cited this as an expected benefit.

This slow adoption of AI is not a criticism of L&D. It reflects the reality of the adoption of technology. What we can do with any new technology only becomes apparent through use, something that will become apparent this year. If 2023 was the year of hype and initial experimentation, 2024 will be the year AI begins to be used in earnest in L&D.

What comes next?

Nothing in the 11-year history of the survey suggests that L&D's current level of interest in AI can be sustained long-term, the only question is how rapidly that interest will fade.

What will happen with AI in 2024?

Three things are likely:

1. AI will continue to develop

Just as the launch of Chat GPT triggered the initial rise of interest in AI, 2024 may see a step change in the capabilities of publicly available tools. Such changes range from a breakthrough such as AGI (Artificial General Intelligence, emulating human cognitive capability) to an enhanced release of Chat GPT, as well as other tools. It is unlikely that this will push interest in AI any higher, but it will sustain current levels.

2. L&D will move from experimentation to application

Eventually, AI will be like electricity – widely used in the background to power the tools we use daily. That has been happening for a while, with Natural Language Processing embedded in tools such as Siri and Alexa. Experimentation is the key. It is only by experiencing what we *can* do with AI that L&D will begin to consider what *could* be done with it in the future.

3. There will be an anti-AI content reaction

The GSS Focus report *AI in L&D: The State of Play* suggests that today's powerful, cheap AI tools will mostly be used to create learning content. It is likely, that a great deal of this content will be mediocre. People will not blame the content creators for this, but the tool, just as Microsoft PowerPoint is seen as culpable for poor presentations.

The survey has repeatedly seen options sink from the upper parts of the table to the bottom as they move from being 'hot' to being part of business as usual. This will happen with AI, but it will take years. The descent may be accelerated by the shift from excitement to disappointment which will inevitably accompany the realisation that not every promise or hope about AI can be realised. It is inevitable that negative stories around AI will continue in 2024.

QUESTIONS

- What does AI mean for your organisational business model?
- Who in your network is using AI, and for what?

A new data focus

The pandemic affected sentiment in L&D strongly. This was most obvious in the challenges respondents suggested they faced in the 2022 survey, when we first asked the question "What is your biggest L&D challenge in [year]?"

Respondents were clear that they faced issues overcoming online fatigue, with people rejecting online learning when so much of their working lives were already spent in front of a computer.

The impact of Covid-19 was also marked, more subtly, by a shift in sentiment. Options which seemed to have a more human feel attracted more votes, while data-focused options attracted fewer.

In the 2021 and 2022 surveys, votes for Collaborative/social learning rose, against the downward trend. This seems to have been due to L&D believing that people-focused solutions were needed during the restrictions of lockdowns.

In contrast, votes for Personalization/adaptive delivery continued to fall through the pandemic, but with the rise in interest in AI, that six-year trend has been reversed. The reason: L&D sees personalization of content as one of the key benefits of AI. For more, see the 2023 GSS Focus report *AI in L&D: The State of Play.*

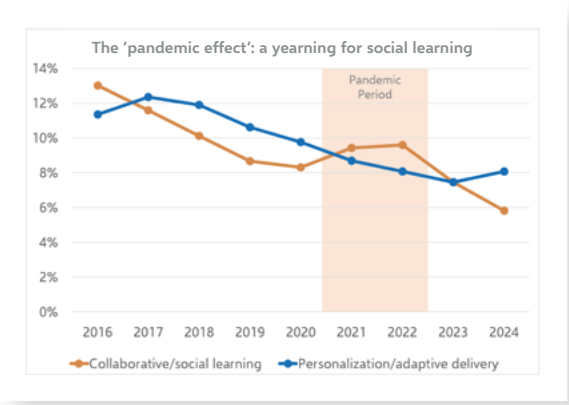

Figure 14:
Votes for Collaborative learning and Personalization 2016-24

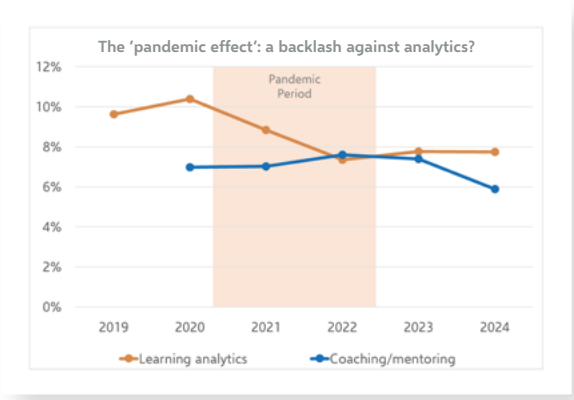

Figure 15: Votes for Learning analytics and Coaching/mentoring

Similarly, the very human option of Coaching/mentoring experienced an uplift during the pandemic, and interest has since waned, falling by 1.5% this year. This looks like a rejection of a human-centred approach to learning, although with just five years' data it is possible that this is the natural pattern every option takes, of moving from interest to indifference.

The change in fortunes for Learning analytics is more marked. After an initial burst of interest from 2019 to 2020, it failed to keep people's attention during the pandemic, but has since bounced back, and in the shadow of AI, has managed this year – like Personalization/adaptive delivery – to maintain its share of the vote.

In last year's report we discussed how L&D seemed to have returned to its pre-pandemic focus on data. This year's results support that view. It looks like L&D is currently data- and tech- focused. It may be, however, that more exposure to the possibilities of AI-supported coaching and collaboration will blur the stark lines that L&D currently sees between people and machines.

And while L&D seems consciously focused on new, data-supported learning systems, it is not going through an uncritical love affair with technology. On the next page we'll see how some technologies are leaving L&D cold.

QUESTIONS

- Which departments in your organisation are using data well? What are they doing?
- How would you ensure you are linking business and learning data?
- Are you confident your team has the skills necessary to interpret this data?

Winners and losers

When a single option attracts as much attention as AI has this year, there will be fewer votes available elsewhere. The decline in votes, however, is not uniform across all options. As we saw in Key takeaways, there is a considerable difference in how votes have fallen this year, ranging from Skills-based talent management, falling by just 0.1% against last year's vote, to the 1.8% drop of Learning experience platforms.

Low on the table

Usually, options start high on the table and over the years slip down the table as they become less 'hot'. This has not been the case for The Metaverse, which on its introduction to the survey in 2023, collected just 2.6% of the vote. This year has seen that drop to 1.6%. If we had introduced the term a year earlier and caught the buzz around the Metaverse at the end of 2021, the reaction would have been different – see Figure 16.

Whatever value the Metaverse may or may not have, it is clearly not currently being considered seriously by L&D and is languishing at number 14 on the main results table. Suffering a similar lack of interest, this year's new entry – Cohort-based learning – has entered at position 15 with just 1.6%.

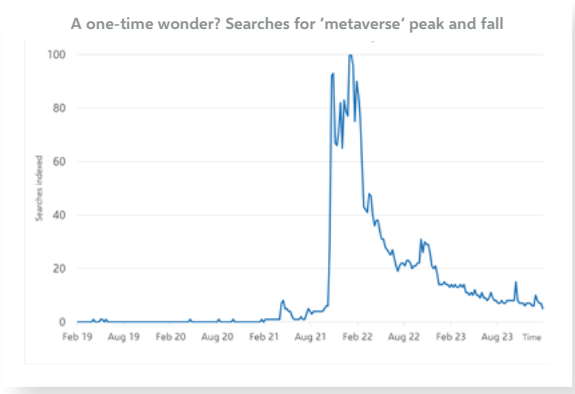

Figure 16:
Google Trends searches for 'metaverse' Feb 2019 – Feb 2024

Micro learning: a winner despite losing

Most options are not subject to the extreme peaks and troughs of interest that AI and The Metaverse have experienced. They make a quiet journey over the years towards the bottom of the table and are then retired. This descent is usually even, meaning that variations from it stand out.

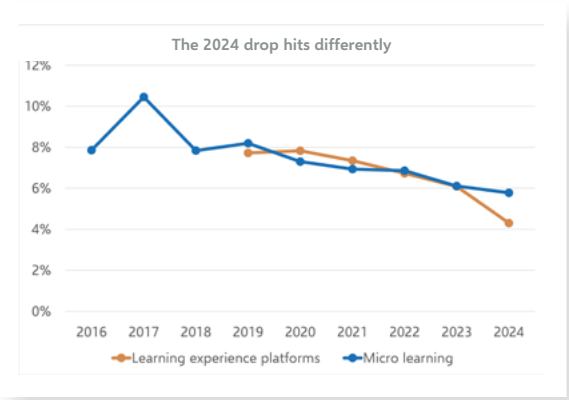

Figure 17: Decline in votes for LxPs and Micro learning

Micro learning had an explosive start on the survey, as chronicled in *How ideas spread in L&D*, then settled down to the familiar, long decline in popularity. The rate of decline of its share of the vote neatly paralleled that for Learning experience platforms (LxPs), as seen in Figure 17.

After five years shadowing each other, however, this year the two voting patterns parted. While Micro learning continued to gradually lose votes, the vote for LxPs plummeted. No option lost more this year.

Clearly, the option of Learning experience platforms was more affected by the popularity of AI than Micro learning. The simplest explanation for this is that LxPs have been in the L&D space since at least 2017 (see The evolution of the term 'Learning Experience Platform' by Emma Chambers of Learning Pool). Excitement around technologies only lasts so long and will always be affected by the appearance of a newer, more exciting alternative.

This looks like a classic case of vote substitution, or to put it less kindly, of 'shiny object syndrome', where voters ignore a previous favourite for a newer, more exciting alternative.

If this is true – why did votes for Micro learning not decline so rapidly this year? Micro learning is not so much a technology as a loose description of a form of content. If anything, the association with AI is positive: it is now easier than ever to produce micro learning content using generative AI. Whether that content will meet a performance need is another matter.

Value takes a hit

Three options cover the idea of providing value to the organisation in different ways: Consulting more deeply with the business, Showing value and Performance support. Ideally, L&D should consult with the business, carry out some form of activity (perhaps including Performance support) and then be able to show the business the value this activity has created.

Since 2019, these three options have stayed in the middle of the table, bucking the normal downward trend – until this year. This year, all three fell in popularity by between 1.3% and 1.6%.

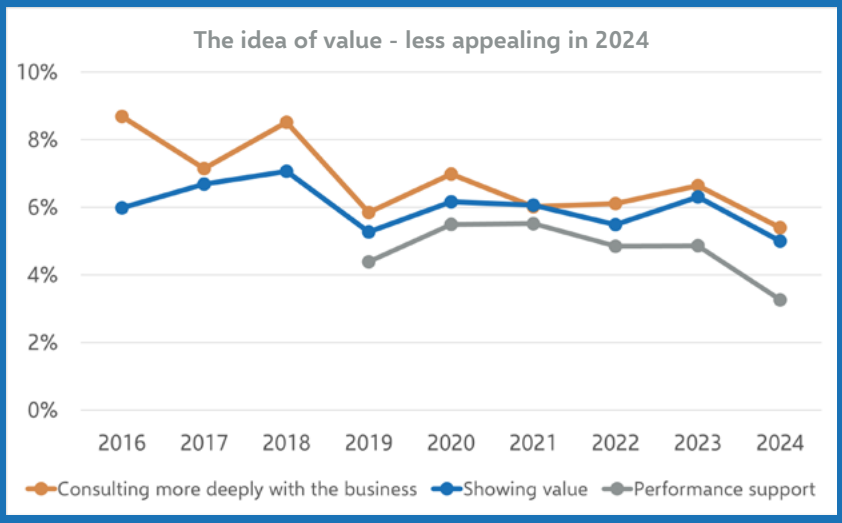

Figure 18: The 'value trio' in decline in 2024

There is no obvious reason for this decline. There is no substitution effect, no reason why voters might logically switch their attention from these three options about L&D strategy to AI.

Nonetheless, it looks very much as if vote switching has happened, which is most likely because of the form of the question 'What will be hot in workplace L&D in 2024?'. We do not define any part of the survey, including the word 'hot', and certainly from 2019 to 2023, people continued to regard these three 'value' options as 'hot' in some sense.

In 2024, however, the sheer noise around AI makes it impossible to ignore, and if it therefore demands our attention, something must give. It is impossible to know what exactly the decreased vote for these three options reflects. Is it a cold realism among respondents that AI, while it may not yet be fully applicable, is certainly 'hot'? Or is it rather that respondents feel more excited about AI than about value, a classic 'shiny object' voting decision? We cannot tell this year, but it will be interesting next year to see whether these three options, which have been so resilient in the past, regain some appeal among respondents.

QUESTIONS

- What technologies or methodologies do you think are suffering due to L&D's current focus on AI?
- Current hot topics can shift our attention away from important issues like showing value. What can you do to remain focused on important issues?

The challenges ahead

For the third year, respondents could reply in free text to the optional question 'What is your biggest L&D challenge in 2024?'

Although 18% fewer people responded to the survey this year, a far greater proportion of them answered this question, from 40% in 2022 and 2023 to 94% this year.

Between them, these 3,083 people described their challenges in over 27,000 words, which is about the length of Ernest Hemmingway's *The Old Man and the Sea*. Of these words, the most common was 'learning', the second, 'AI'. This year, AI is both 'hot' and the leading challenge for L&D.

> *This year, AI is both 'hot' and the leading L&D challenge*

The nine categories

After reading all comments we analyse them for 51 key words, grouped into nine categories. If one of the words occurs in a comment, it is put into one or more of these:

1. Content
2. Data, analysis impact
3. Delivery
4. External factors
5. Organisational issues
6. People
7. Resources, budget, workload
8. Strategy, skills, talent
9. Technology

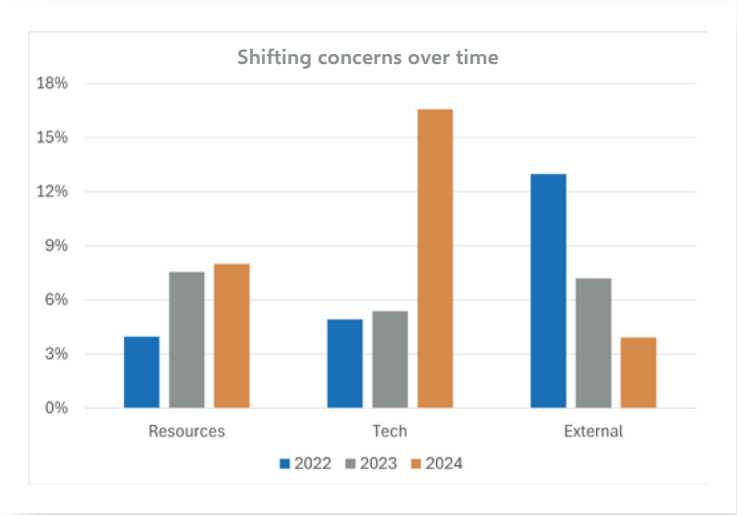

Figure 19: L&D's shifting challenges, by category

Of these nine categories, three stand out. Technology has moved from being the least challenging category last year to the greatest this year, thanks to artificial intelligence. This is not only due to increased use of the term 'AI' in responses; technology more generally was also mentioned more often – see below for more on this.

Over the three years we have been tracking this question, Resources category has shown a steadily increasingly importance in people's minds, perhaps reflecting tighter economic circumstances for most respondents. Meanwhile, external factors have become steadily less important. They peaked in 2022 as L&D struggled to cope with the impact and aftermath of the pandemic and have declined ever since. Even so, the word 'war' appeared in 33 comments this year, a reminder of the geopolitical difficulties faced by many respondents.

The 51 words

Excluding 'learning' and 'L&D', the eight most commonly occurring individual words are:

AI	489	skills	160
business	237	budget	146
training	208	people	146
time	187	value	130

Previously, 'train' has always ranked in the top three concerns of respondents, and 'business' in the top four. The incidence of other terms has been more variable – see Figure 20.

Note: Figure 20 shows the incidence of words and stems, so 'valu' includes 'valuation', 'value' and 'valuing'. Similarly, 'skill' covers 'skilled', 'upskilling', 'unskilled' etc.

Everyone in L&D seemed to be talking about ChatGPT during polling for the 2023 survey. Despite this, AI was mentioned in just 23 responses in 2023, against 489 this year. It is also notable that, separately, 'tech' has increased in frequency this year – is it possible that widespread discussion over AI has led to a greater uncertainty over technology as a whole?

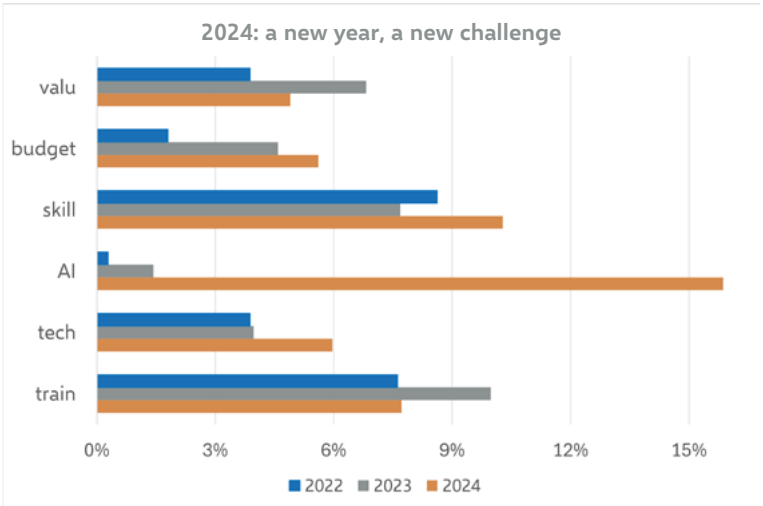

Figure 20: Frequency of incidence of key challenge words

Three of the **3,083 challenges** shared by respondents:

> *"Once again proving the value of learning & development teams while being asked to do twice as much with half as much"*

> *"Changing the perception of L&D within an organisation that expects L&D to only be mandatory elearning modules"*

> *"Separating the signal from the noise with new technology - and focusing energy and investment where it matters most"*

Text analysis

Most comments are in English, and we translate the remaining 5% into English using Google translate. Of the 12 other languages, the most common were Thai (67 responses) and Indonesian (31).

Comments are spell checked and sense checked, then we count for the incidence of word stems. The stem 'skill' will include 'reskilling' and 'unskilled', for example. If a comment mentions a word or stem more than once (for example, in the phrase reskilling/upskilling), that only counts as one incidence added to a particular category.

Initially, about 70% of comments are assigned to categories automatically.

The assignment of comments to categories is then checked for sense, and where possible unassigned comments are manually put into categories. Where the meaning of a comment is unclear, the comment is not assigned. For example, the comment 'attrition rate and attraction measures' could refer either to the internal L&D team or to an organisation's employees, and so was left unassigned. This year we were able to group 86% of comments into categories.

Conclusions

A choice for L&D

Superficially, L&D might seem to be in the same position as it was last year. The conclusion to the 2023 report noted that "AI heralds a new era of how we work, live and learn. Is L&D ready?" We could ask the same question today. For all the surface similarities, however, L&D is in a subtly different place. Things are on the move. And this presents L&D with a fundamental choice.

Last year, those in workplace L&D placed AI eighth on their table, a vote that seems inexplicably low today. This year, AI tops every work group's voting table, and by some margin. The GSS Focus report *AI in L&D: The State of Play* shows that at least some workplace L&D practitioners are putting AI to use.

This is progress, but against the daily news of advances in technology in general, and AI in particular, L&D's pace of change can seem ploddingly slow. This is the reality behind Everett Rogers' familiar diffusion of innovations curve, shown in *Methodology*. Rogers' work drew heavily on studies of the adoption of hybrid corn among American farmers in the 1940s. The new seed corn was more robust and delivered a better yield, but Rogers' own farmer father was only persuaded to adopt it after eight years, and even then, only when he saw its success in a neighbouring farmer's fields.

This corn was a simple substitute for the Midwestern farmers – like their existing crops but better. It still took years for it to be accepted. L&D faces a far greater degree of disruption with less time to adapt. This is not simply a matter of getting used to new technologies. It is about assuming a different, broader and more challenging role.

In the past year we have seen an explosion in tools which accelerate performance at work. GPTs and other AI tools can create content and entire courses at the press of a button. Workplace AI technologies such as the Microsoft Office copilots provide employees with an immediate productivity boost. Tools using Large Language Models can scour organisations' repositories of information and surface tacit or lost knowledge which everyone can use.

All this might once have been in the domain of L&D, but these tools are open to all. In a world where information is cheap and widespread, and the tools to manipulate it easy to use and increasingly powerful, what is the role of L&D?

I first asked this question in 2012, against the backdrop not of AI but of surging economic, social and technological change – all forces we are still subject to. I suggested that L&D had a choice. We could change as fast the business and lead learning in a world where skills and human capital were increasingly important, or we could accept that others would take the lead in developing people and retreat to what I called the Training Ghetto.

In the Training Ghetto, L&D has a limited role – it looks after routine skills and knowledge maintenance, particular mandatory training. Others outside L&D – curious individuals keen to improve performance – use exciting new technologies and methods to ensure that people develop and do their jobs well.

What would stop L&D being confined to the Training Ghetto? A realisation and a choice. First, the realisation that while the tools of the job have changed, the role of L&D has not. Its aim remains to help individuals and organisations fulfil their potential.

The choice is how we do that. For years, L&D's daily routine focused on the production and distribution of content. No longer. There is already an excess of content, and generative AI will only lead to more of it being produced, by anyone in the organisation.

There are plenty of questions in this report, but here is one that everyone in L&D should ask themselves: suppose you spend 10 hours a week producing and maintaining content, and AI now enables you to do that in 1 hour. What will you do with the remaining 9 hours?

The answer 'Create more content' is like continuing to use old seed corn with a poor yield. It would be better to use the time to engage with the business and truly understand its immediate and strategic needs, to build powerful, influential networks across the organisation and to set the agenda for a skills strategy. That is how L&D can help individuals and organisations fulfil their potential today.

The future can be an exciting place and L&D can have a powerful impact. It's our choice.

> *L&D can have a powerful impact. It's our choice.*

Caveats

The L&D Global Sentiment Survey is an anonymous, online poll, which means there are caveats around the data. Please also see *Interpretation*, page 5 to understand what we can and cannot legitimately understand from the survey.

Respondents are largely unqualified

We do not know for certain whether the respondents work in L&D. Some are approached via direct messaging on LinkedIn because of their job title, but could have moved jobs. People approached via email will have shown some interest in L&D in the past, but may no longer. We cannot guarantee that any respondents worked in L&D when voting, or that they have not passed the voting link on to others unconnected to the field. We cannot control who responds to links shared on social media.

Respondents are likely to be more tech-savvy than most

Most respondents are invited to participate via social media and email. They are, therefore, a self-selecting group. Because they are contacted – and answer – electronically, respondents are certainly users of technology, and probably more likely to feel positively about technology than the general population. This method of canvassing votes means that anyone working offline is excluded.

Year-on-year comparisons may be unsound

Because the survey is anonymous, it is impossible to guarantee that the same people vote each year. In fact, as the numbers on the survey increase each year, it is certain they are not. This could lead to variations between surveys arising from changes in the make-up of the surveyed population, not in changes to sentiment of the originally surveyed population.

Respondents may not share the same understanding of the options

To make the survey quick to complete, no definitions are provided. If they were provided, this would give an illusion of certainty, but we would have no guarantee that respondents would use the given definitions. Also, not all fluent English speakers will necessarily agree on the definition of all the terms, and non-fluent English speakers may vary more widely in their understanding.

Key individuals/organisations may skew results from some countries

In some countries, respondents are largely attracted to the survey by individuals or organisations prominent in that country. In Sweden, for example, the survey was mostly promoted by a single company. It does not look as if this has skewed the results for Sweden, but it remains a possibility.

Definitions

These definitions are here for reference.
They were not provided to survey respondents.

*** New in the 2024 survey**
Removed from the survey this year: Mobile delivery.

Artificial intelligence
Software that uses algorithms to interpret data and make apparently intelligent choices about, for example, choices of learning content, methods and timing of delivery.

Coaching/mentoring
Working with individuals to help them develop themselves, usually in a work setting, and usually one-to-one. Less structured and content-focused than training, and often taking place over an extended period.

Cohort-based learning*
The provision of learning experiences in groups. Usually refers to a combination of one or more of: synchronous online learning experiences; asynchronous work; sessions led by facilitators; individual and group work offline, and collaboration via online forums.

Collaborative/social learning
Learning that happens through working together, often but not always using social technology, both within and outside an organisation.

Consulting more deeply with the business
A move from focusing on designing and delivering learning events/ experiences in isolation towards providing a broader service to understand business needs and their constraints, and facilitating and enabling learning, development and improved performance.

Learning analytics
Used since at least 2012 in the educational field, in workplace learning the human (as opposed to machine-based) process of data-supported decision-making to improve learning.

Learning experience platforms
A loose term for a new generation of cloud-based, enterprise learning platforms. Unlike the LMSs they aim to replace, they are user-centred, often with elements of social learning.

The Metaverse
A single, shared, immersive, persistent 3D virtual space where people can work and learn in ways that simulate and go beyond their experience in the physical world.

Micro learning
Learning designed according to our understanding of neuroscience, memory and recall, typically incorporating small learning 'units' or 'objects' making use of a variety of media and technology.

Performance support
In contrast to helping people learn information, this is the process of helping them do their jobs better, often by providing helping at a particular moment of need, rather than in advance.

Personalisation/adaptive delivery
The ability for an individual to make use of a variety of experiences, approaches, strategies and tools to address their own distinct needs, interests or aspirations.

Reskilling/upskilling
Helping individuals develop their abilities within their existing role (reskilling), and helping individuals develop themselves for new roles (upskilling).

Showing value
Demonstrating the performance improvements and business benefits that arise from L&D activities.

Skills-based talent management
Defining roles and individual and organisational capability in terms of skills. Usually done via a platform and incorporating functionality for recruitment as well as learning.

Virtual and augmented reality
Providing users with an alternative environment (typically through a headset) or information superimposed on the real environment (typically via a hand-held device).

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About the author

Donald H Taylor

Donald H Taylor has worked in workplace learning and development and learning technologies since the mid-1980s, and has experience at every level from design and delivery to chairman of the board.

A recognised commentator and thinker in the fields of workplace learning and supporting technologies, Donald is committed to helping develop the learning and development profession. From 2010 to 2021, he chaired the Learning and Performance Institute.

Since 2000, he has chaired London's Learning Technologies Conference, the largest event of its type in Europe, and he contributes to conferences worldwide. His annual L&D Global Sentiment Survey, running since 2014, attracts responses from thousands of respondents world-wide.

He brings his broad understanding of the field to Emerge Education, an early-stage Venture Capital fund, where he chairs the Workforce Development network, and advises several EdTech start-ups as they grow their businesses.

The author of *Learning Technologies in the Workplace* (Kogan Page, 2017), Donald is a graduate of Oxford University and in 2016 was awarded an honorary doctorate by Middlesex University in recognition of his work developing the L&D profession.

You can find him on **LinkedIn** and at **www.donaldhtaylor.co.uk**.

Donald Taylor is based in London, UK, and helps organisations understand emerging trends in the field of Learning and Development – and how to distinguish between hype and reality.

To download this and previous reports from the Global Sentiment Survey, visit: https://donaldhtaylor.co.uk/the-research-base/

When citing this report, please refer to The L&D Global Sentiment Survey 2024 by Donald H Taylor. The hashtag is #GSS24

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