Learning and Development

Global Sentiment Survey

2023

In association with

OpenSesame

Foreword

The return to data

This year's Global Sentiment Survey – the tenth – paints a picture that is both familiar and unusual. In our 2020 survey report, we noted that 'Data dominates this year's survey'. It does so again this year, with the near 4,000 respondents showing a strong interest in AI, Skills-based talent management and Learning analytics (in positions #2, #3 and #4), all of which rely on data. The table is topped by Reskilling/upskilling, in the #1 spot for the third year running.

While apparently familiar, these results are extremely odd. It is not usual for one idea (Reskilling/upskilling) to dominate the top of the table for so long. And just below the top spot is something even more unusual. Over time, ideas which were once hot lose their appeal. On the survey we see this as their share of votes declining over time. Yet both Learning analytics and AI have reversed that trend this year – AI quite spectacularly.

This is all very different to the results over the two years of the pandemic. In 2021 and 2022, lockdowns and a shift to online learning led to an uptick in in support for collaborative learning and coaching in contrast to the other, technology-focused options, all of which fell in support.

> This is all very different to the results over the two years of the pandemic.

This year, that has been swept away by a tide of enthusiasm for AI, fuelled by the launch of ChatGPT, 8 days before the survey opened. This change of heart is evident not only in responses to our main question "What will be hot in workplace L&D in 2023?" but also in the free text answers to the question "What is your biggest L&D challenge in 2023?" Here, words associated with the pandemic were used less, and those around budget, value and impact far more.

It seems as if L&D has returned to the pre-pandemic normal of an interest in data and a concern to show value in order to secure budgets. But is this an illusion? Are we back to normal, or at a turning point?

Is the availability of accessible AI tools creating a new and very different outlook for L&D?

This year, for the first time, we include a section on the interpretation of the Survey results. We don't make untenable claims based on the Survey, but as it grows in popularity and reach, others may do. Please do read this section and approach claims made based on the Survey results with informed caution.

As always, we must end by thanking our sponsors. Without OpenSesame, Speexx, Netex, Learning Pool, getAbstract and Nomadic Learning, this survey would not have been possible. We look forward to continuing in 2024 with a survey that will be both wider in reach, and deeper in content.

Donald H Taylor

Content

The questions

The L&D Global Sentiment Survey has run annually since 2014, with voters invited to participate via a combination of email, social media and direct messaging. The 2023 survey ran for 66 days, from 8 December 2022 to 11 February 2023, with one obligatory question:

'What will be hot in workplace L&D in 2023?'

There were also two optional questions:

'Which of these best describes where you do most of your work?'

- a multiple-choice question, with six options, answered by 86% of respondents.

'**What is your biggest L&D challenge in 2023?**'

- a free text question, answered by 40% of respondents.

The details

- Respondents were asked to vote for what would be hot, not what should be.
- Respondents chose three options from a randomized list.
- There were 16 options, including 'Other'.
- Options were not defined, neither was the question.
- To understand more about each option, see *Definitions* for more.
- For caveats around the methodology, see *Caveats* for more.

The options

Artificial intelligence	Performance support
Coaching/mentoring	Personalization/ adaptive delivery
Collaborative/social learning	Reskilling/upskilling
Consulting more deeply with the business	Showing value
Learning analytics	Skills-based talent management
Learning experience platforms	The Metaverse*
Micro learning	Virtual and augmented reality
Mobile delivery	Other
	* New in 2023

Methodology

Aims

The L&D Global Sentiment Survey is an annual pulse 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, the same every year, which can be read and answered rapidly and instinctively. In 2023, 80% of respondents answered in two minutes or less.

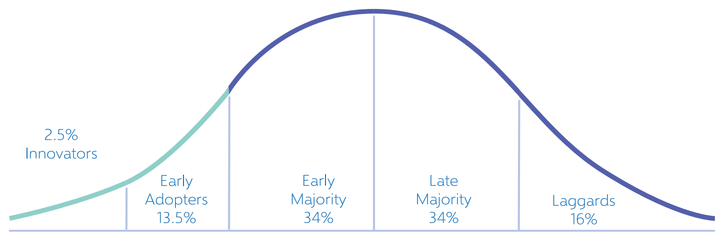
Why focus on something as intangible as sentiment, rather than something more concrete, such as plans for the following year? Partly because other surveys do that, but mostly because the aim of the survey is to understand the likely direction of L&D in three or four years' time.

Collecting data

Votes were solicited first by a social media campaign on Twitter and LinkedIn, in December 2022, and then by email, social media and messaging in January 2023.

Participation comes from a self-selecting sub-group of the L&D community, the ones 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. The survey's results over the years support this. Ideas which were initially 'hot' and highly placed often move on to be more widely adopted (but not always – see *Time and the GSS*, pg 12).

Whatever new technologies and methodologies are adopted by L&D, each of them at some point was popular with the innovators and early adopters at the left of the Everett Rogers Diffusion of Innovation Curve. Not every new idea which 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.



Diffusion of innovation curve, Everett Rogers

This, then, is the aim of the survey – to try to understand which of these new ideas is a fad and which is likely to be more widely adopted.

Additional data

We can add further dimensions to the data set with longitudinal data from previous surveys. In addition, the survey platform uses respondents' IP address to understand their country and city, although this must be used with some caution, see the next section, *Interpretation*, pg 5.

Interpretation

The GSS is the only data set we have that examines L&D sentiment at scale over a protracted period, but 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 2023?', does not show L&D's plans for 2023. 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 what they *may* be doing in a few years' time.

The optional question, 'What is your biggest L&D challenge in 2023?', shows people's concerns as the start of the year. It does not tells 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 annually.
- 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 Methodology, this is not a bad thing. We are interested in exactly what these people think, in order to see what wider 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 such as LinkedIn and Twitter, 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 actually 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 now wide-spread. 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 actually doing the work on the ground.

How is the survey useful?

The primary role of the survey, we believe, is to stimulate questions. Will AI have a lasting impact on L&D, or will it be supplanted by some other trend next year? Why are the Dutch consistently interested in Performance support and the Brazilians in Collaborative learning? Why does the USA consistently rank Personalisation above Collaboration? When these patterns have lasted for years, we can accept that the data is imperfect, but also concede that there are real trends here worth investigating.

Interpretation

In interpreting the survey and the tables and graphs in this report, it is always necessary to ask what a line on a graph or a number in a table really shows. Why is AI soaring? If Micro learning has fallen down over the years, does that mean it is useless or is now widely spread? Without the addition of context, the data alone is almost meaningless.

This is why we always say that the primary role of the survey is to stimulate questions. And nobody should accept any presentation of the data without asking that key question:

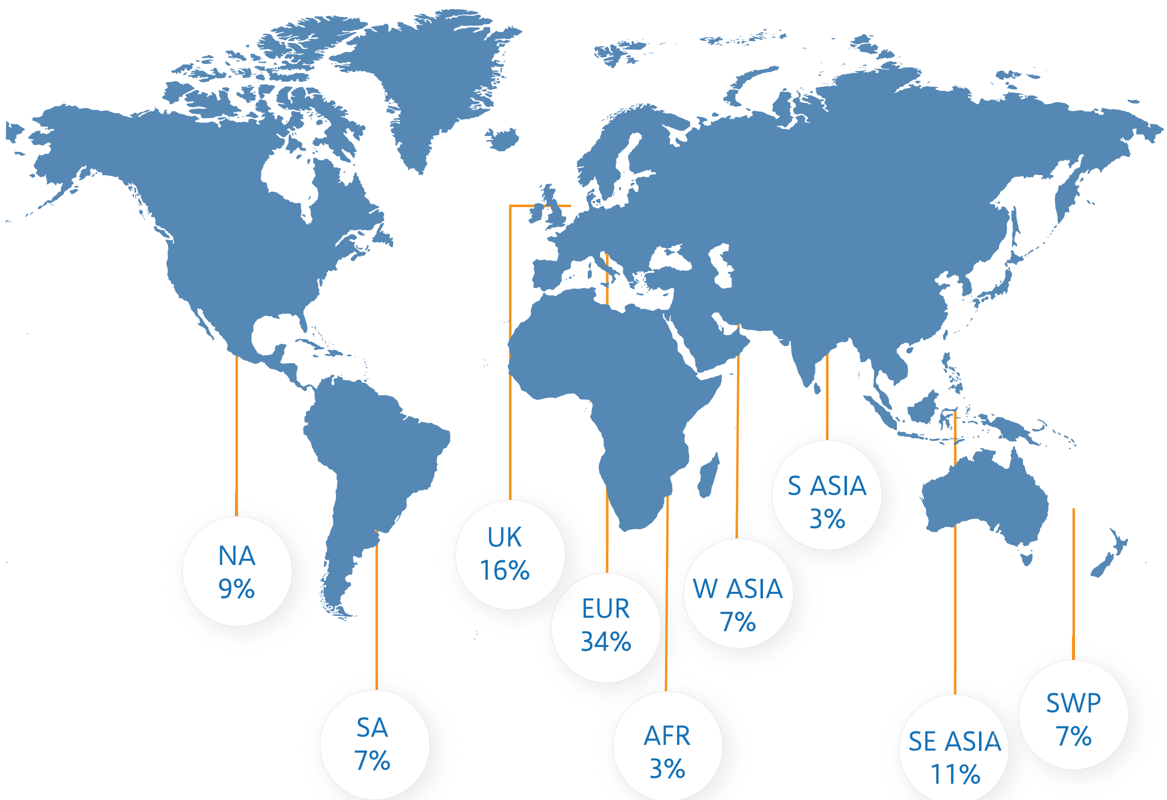
"What does this really mean?"

Who voted?

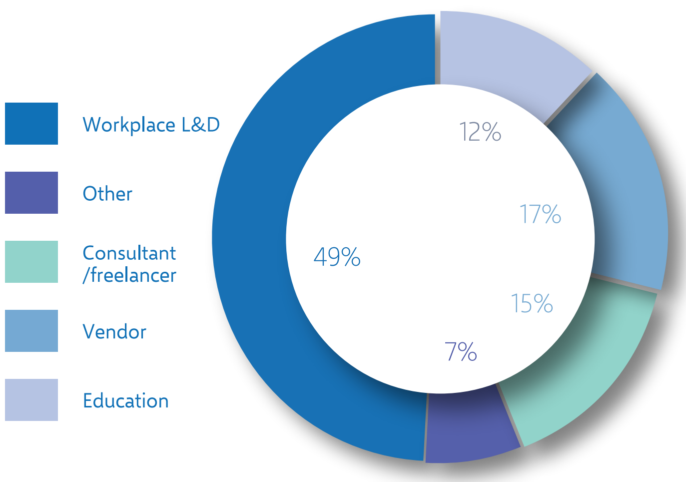
A worldwide view

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

3,996 people from 100 countries voted in this year's survey, 14% more than last year.



86% of voters chose to answer the optional question 'Which of these best describes where you do most of your work?'



Top 18 countries

In 18 countries, more than 85 people voted:

Australia	168	New Zealand	108
Brazil	251	Philippines	87
France	119	Poland	142
Germany	118	Spain	103
India	124	Sweden	107
Ireland	130	Turkey	147
Israel	129	Ukraine	212
Malaysia	329	United Kingdom	624
Netherlands	179	United States	276

The results

There are three key stories in this year's results table:

- Data returns
- Context is king
- Interest in value endures.

Reskilling/upskilling remains at the top of the table for the third year, but once again drops 0.5% on the previous year, continuing the inevitable downward trajectory of almost all options. For more on this trend see *Time and the GSS*, pg 12.

Most striking is the return of data to dominate the upper part of the table. The options rising to #2, #3 and #4 are all underpinned by data: Artificial Intelligence (AI), Skills-based talent management and Learning analytics. The rise of AI in particular, leaping 4.5% from #12 to #2 is unprecedented. For more, see *The return to data*, pg 15.

This table is an aggregate of some 4,000 people's opinions from a multitude of different countries, companies and contexts. Those contexts are key to understanding what lies behind the numbers. For more, see *The view across workspaces*, pg 10 and *Key takeaways*, the next section.

And at #8 and #9 are two options that remain resolutely in the middle of the table: Showing value and Consulting more deeply with the business. Why do these options buck the downward drift of every other option? See *Time and the GSS*, pg 12 for more.

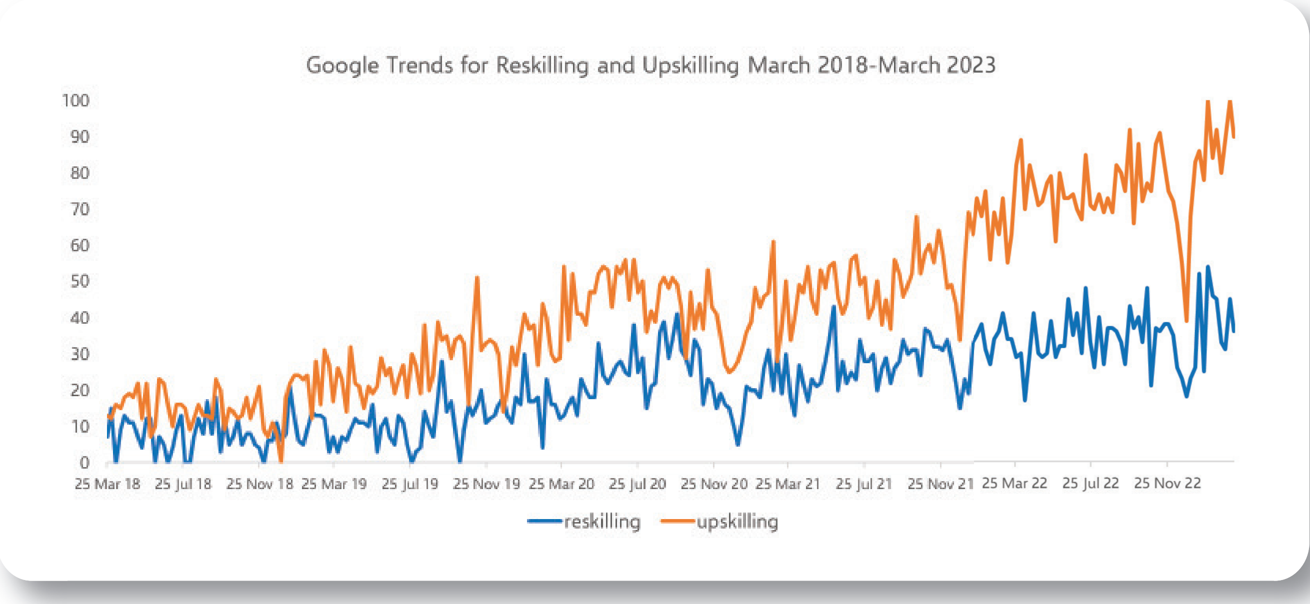
GSS 2023		∆%
1. Reskilling/upskilling (1)	12.0%	↓
2. Artificial intelligence (12)	9.2%	↑
3. Skills-based talent management (6)	9.0%	↑
4. Learning analytics (5)	7.8%	↑
5. Collaborative/social learning (2)	7.5%	↓
6. Personalization/adaptive delivery (3)	7.5%	↓
7. Coaching/mentoring (4)	7.4%	↓
8. Consulting more deeply with the business (9)	6.6%	↑
9. Showing value (10)	6.3%	↑
10. Micro learning (7)	6.1%	↓
11. Learning experience platforms (8)	6.1%	↔
12. Performance support (11)	4.9%	↑
13. Virtual and augmented reality (13)	3.5%	↓
14. The Metaverse (new)	2.6%	new
15. Mobile delivery (14)	2.2%	↓
16. Other (16)	1.4%	↓
n = 3,996		

Figures in brackets show previous year's ranking

"data returns to dominate the upper part of the table"

Key takeaways

This survey has four key take aways – three are visible on the table itself, while the fourth is evident from the way votes are cast over time.



Reskilling/upskilling holds at #1

Reskilling/upskilling dominated when it was first introduced onto the survey in 2021 with a score of 13%, unmatched for the previous 5 years and almost uniformly supported globally. This year the support, at 12%, is still impressive, but it is far from uniform. Without a 17.9% vote from Malaysia (n=329), it would still have topped the table, but with 11.5% of the vote.

General interest in reskilling and upskilling continues to grow, as evidenced by the number of Google searches for the terms worldwide (see graphic above). However, with support for the terms falling to 10.9% of the vote in North America this year, we can expect its descent in the GSS to continue. For more on how North America typically sets trends, see *How ideas spread*, pg 14.

Data dominates

Positions #2, #3 and #4 on this year table are taken by options which rely on the use of data – Artificial intelligence, Skills-based talent management and Learning analytics. All three are in higher positions than last year, with Artificial intelligence moving up 10 places on the table, an unprecedented leap of 4.5%. This movement was all the more impressive given than AI had been slowly making its way down the table since placing #2 in 2019. In 2020, Learning analytics topped the table and had since been on the decline. For two options to reverse their download trend like this is unheard of. The driver for the change: ChatGPT, launched roughly one week before the survey launched. For more on this, see *The return to data*, pg 15.

Interest in value remains solid

Over time, any option on the table trends downwards. After all, nothing can remain 'hot' for ever. Three options, however, defy this downward trend: Showing value, (first put on the table in 2015), Consulting more deeply with the business (2016) and Performance support (2019). All three revolve around the same idea of providing value to the business. All three have attracted roughly the same share of the vote since they were introduced, with their scores for the past five years staying within 0.6% of their average for that period. This seems to suggest that there is a core proportion of respondents for whom this topic of business value is of unchanging importance, year on year.

Voters are fickle

The Metaverse was added to the table of options this year. Until the 2023 survey, the average vote for a new option joining the survey was 7.1%. The Metaverse attracted just 2.6% of the vote. Almost certainly this low number was down to bad news about the Metaverse just before the survey was launched. In early November, Mark Zuckerberg announced 11,000 layoffs focused on Meta's Metaverse, part of a so-called 'Techsodus' across major technology employers. In contrast, the launch of ChatGPT in late November was perfectly timed to boost Artificial intelligence up the table. This is not the only year that this has happened, and this fickleness is not confined to L&D practitioners. For more, see *How ideas spread*, pg 14.

The view across workspaces

86% 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
- Employed by a vendor
- In the education sector
- Other

GSS 2023 Workplace L&D	
1. Reskilling/upskilling	12.4%
2. Skills-based talent management	9.8%
3. Learning analytics	8.4%
4. Coaching/mentoring	7.9%
5. Personalization/adaptive delivery	7.6%
6. Collaborative/social learning	7.4%
7. Consulting more deeply with the business	7.3%
8. Artificial intelligence	6.9%
9. Showing value	6.8%
10. Micro learning	6.1%
11. Learning experience platforms	5.8%
12. Performance support	5.3%
13. Virtual and augmented reality	3.2%
14. The Metaverse	2.2%
15. Mobile delivery	2.0%
16. Other	0.9%
n = 1,687, 49% of those responding	

GSS 2023 Self-employed	
1. Reskilling/upskilling	11.0%
2. Artificial intelligence	9.7%
3. Collaborative/social learning	9.1%
4. Consulting more deeply with the business	7.8%
5. Skills-based talent management	7.5%
6. Showing value	7.2%
7. Coaching/mentoring	7.2%
8. Personalization/adaptive delivery	7.2%
9. Learning analytics	6.3%
10. Learning experience platforms	5.7%
11. Performance support	5.2%
12. Micro learning	5.0%
13. Virtual and augmented reality	3.8%
14. The Metaverse	3.1%
15. Other	2.5%
16. Mobile delivery	1.7%
n = 523, 15% of those responding	

GSS 2023 Vendors	
1. Reskilling/upskilling	12.7%
2. Artificial intelligence	10.3%
3. Skills-based talent management	9.4%
4. Consulting more deeply with the business	8.2%
5. Personalization/adaptive delivery	8.0%
6. Learning analytics	7.7%
7. Showing value	6.8%
8. Collaborative/social learning	6.6%
9. Micro learning	6.0%
10. Coaching/mentoring	5.8%
11. Learning experience platforms	5.4%
12. Performance support	4.8%
13. Virtual and augmented reality	3.0%
14. Mobile delivery	1.9%
15. The Metaverse	1.7%
16. Other	1.7%
n = 559, 16% of those responding	

GSS 2023 Education	
1. Artificial intelligence	13.8%
2. Reskilling/upskilling	10.6%
3. Micro learning	8.8%
4. Collaborative/social learning	8.2%
5. Personalization/adaptive delivery	7.8%
6. Skills-based talent management	7.4%
7. Learning analytics	7.4%
8. Coaching/mentoring	7.2%
9. Learning experience platforms	6.9%
10. Virtual and augmented reality	4.7%
11. The Metaverse	3.6%
12. Consulting more deeply with the business	3.4%
13. Showing value	3.4%
14. Mobile delivery	3.0%
15. Performance support	2.9%
16. Other	1.0%
n = 419, 12% of those responding	

A puzzle: the uneven rise of AI

The vote for Artificial intelligence among those in Education (13.8%) is twice as high as for those in Workplace L&D (6.9%). The size of this vote was almost certainly a reaction to ChatGPT and its possible use by students in creating essays and other forms of homework.

And this all makes sense. ChatGPT was hugely popular. It gained one million users in its first 5 days of availability. The question is not why the Education sector reacted so strongly to AI, but why workplace L&D's reaction was so muted in comparison.

Educators were quick to reflect the AI buzz generated by ChatGPT's launch on 30 November. On the first day of the survey, AI ranked #1 among Educators. It temporarily dipped to #3, then recovered to #1 on 21 December, where it stayed until the end of the survey. The other two work groups, while initially slow to appreciate AI, voted for it in increasing numbers as the survey progressed.

In contrast, among workplace L&D employees, the position of AI climbed to #6 at the beginning of January and then actually decreased to #8.

This, then, is the puzzle: why was workplace L&D's view of AI is so starkly different from the other workgroups'? And will it remain that way as 2023 progresses?

Geography matters

The main table of global results is the aggregate view of some 4,000 people from 100 countries. Behind this lies tremendous variation across workplaces and geography.

Exploring differences between territories requires caution. The differences may result not from geography, but from how data was collected. For example, if we only seek voters via a single partner in a country, there is a risk that the data will be skewed. Perhaps that partner is focused on a particular methodology, or technology, and naturally communicates more with people of a similar mindset, and they then reflect this in their votes. See *Interpretation* and *Caveats* for more on this.

Keeping these caveats in mind, it's clear that some trends and differences do persist over time. North America, for example, has since 2017 consistently voted Personalization/adaptive delivery above Collaborative/social learning. Similarly, since we started collecting data from South America in 2021, it has consistently ranked Collaborative/social learning at #1, with a vote of more than 13% each year, and in contrast has never shown much interest in Artificial intelligence – this year's vote of 5.9% vote is the highest it has ever been (see table).

GSS 2023 North and Central America	
1. Artificial intelligence	11.4%
2. Reskilling/upskilling	10.9%
3. Skills-based talent management	9.2%
4. Learning analytics	8.5%
5. Personalization/adaptive delivery	8.2%
6. Consulting more deeply with the business	7.5%
7. Coaching/mentoring	6.8%
8. Collaborative/social learning	6.6%
9. Micro learning	6.2%
10. Showing value	6.1%
11. Performance support	5.0%
12. Learning experience platforms	4.5%
13. Virtual and augmented reality	3.4%
14. Mobile delivery	2.5%
15. The Metaverse	1.6%
16. Other	1.6%
n = 356	

GSS 2023 South America	
1. Collaborative/social learning	13.3%
2. Personalization/adaptive delivery	10.3%
3. Micro learning	10.0%
4. Learning analytics	9.5%
5. Reskilling/upskilling	9.3%
6. Learning experience platforms	8.5%
7. Skills-based talent management	7.9%
8. Consulting more deeply with the business	6.0%
9. Artificial intelligence	5.9%
10. Coaching/mentoring	4.8%
11. The Metaverse	3.8%
12. Showing value	3.7%
13. Performance support	2.8%
14. Mobile delivery	1.8%
15. Virtual and augmented reality	1.6%
16. Other	0.9%
n = 277	

Persistent differences exist at country level, too. For the past four years, Sweden has placed Collaborative/social learning in the top 3 of its table, while over the same period, Ireland has consistently ranked Coaching/mentoring in second place. Over the past five years, Australia has been less enthusiastic than the world about AI – voting for it on average 3.1% less than the world vote each year, while over the same period Poland's vote for AI has exceeded the world's by an average 2.9%.

Usually it is impossible to determine the cause of local differences. Very occasionally, however, it is possible. Since 2019, the Dutch vote for Performance support has outstripped the world's by an average 3.7% annually. The cause: almost certainly the strong local influence of Alfred Remmits, who has championed performance support locally and internationally for years.

Time and the GSS

Each year, the Survey's main table of results attracts attention. But the Survey is not just an annual one-off event. It has run for 10 years, and the trends that we have seen over those years present a challenge of interpretation.

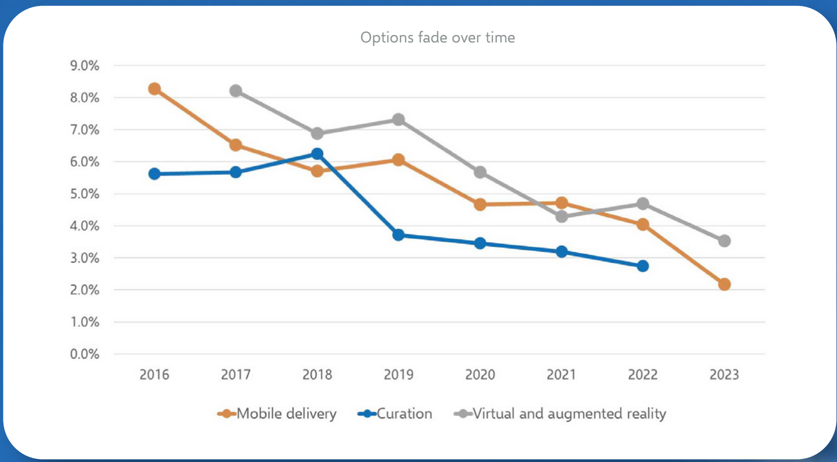
Over time almost every option on the table trends downwards. It is a clear, repeated pattern. What does it mean? And what does it mean when – as sometimes happens – that downward trend does not occur, or is reversed?

A caveat

Voting on the Survey is anonymous. This encourages participation, but also means that we do not know if the same people are voting year-on-year. Because of this, we cannot say for certain that people are changing their minds. It may be a different population is voting, with slightly different views. However, given the numbers involved (over 1,000 voters per year since 2018, and nearly 4,000 this year) and given the consistency of the trends, these graphs and analysis are presented in good faith as the best information we currently have about how sentiment in L&D changes over the years.

Destined to fall

The graph shows Mobile delivery (in orange), which topped the very first table, in 2014. Since then, the vote for this option has steadily drifted downwards. (We only show the results from 2016 here, the year the table adopted its current total of 16 options.)



Why the downward trend? The Survey asks 'What will be hot in workplace L&D?' Mobile delivery has moved from being 'hot' to being completely normal for most respondents. For them, it is now no longer a novelty, but business-as-usual. (It remains strongly supported in South Africa, against a backdrop of unreliable terrestrial infrastructure.)

But a downward trend does not mean every option moves to the mainstream. Curation was also on the original 2014 table. It also fell in popularity over the years before removal in 2022. Unlike mobile delivery, however, curation has not become general practice. Rather, it is something that, although initially exciting, has proved harder and more time-consuming to implement than anticipated.

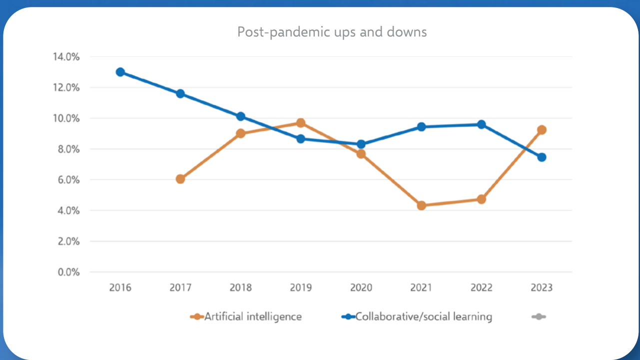
Between mainstream adoption and the slow dying-away of interest suffered by Curation, lie niche technologies such as Virtual and augmented reality (VR and AR). Placing fourth on the table on its introduction in 2017, this option has followed a downward trend ever since. VR and AR are far more affordable and easier to implement in 2023 than they were 7 years ago, and yet they have not moved to widespread adoption. It is not that interest in them has completely faded. They are successfully adopted in some areas of learning, but neither are they part of business-as-usual, like mobile delivery and video.

When things bounce back

The downward trend, however, is not quite inevitable. Collaborative and social learning reversed the trend in 2021, rising 1.1%, almost certainly in reaction to isolation felt during pandemic lock downs. Technology-focused options all fell that same year. This was the largest reversal rise of any option, until this year, when Artificial intelligence jumped from #12 to #2 with a 4.6% increase in its vote.

We cover elsewhere (see *The return to data,* pg 15) the role of ChatGPT in driving this extraordinary reversal. This illustrates the need to look beyond the numbers to context. The numbers alone would indicate AI was following the same route as VR – on the decline, with a slight rise last year, likely to be followed by a final descent.

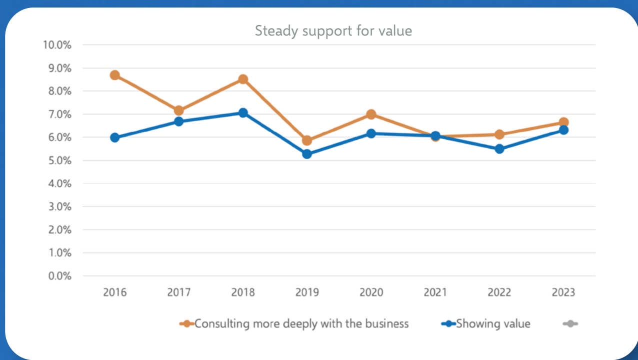
That ignores the context and the technology itself. AI is a generalist tool that will reshape everything we do in workplace learning. In contrast, VR and AR are, as discussed, niche tools. Perhaps it is more surprising that AI suffered the usual slow decline following its peak in 2019. The question remains whether AI can sustain its resurgence.



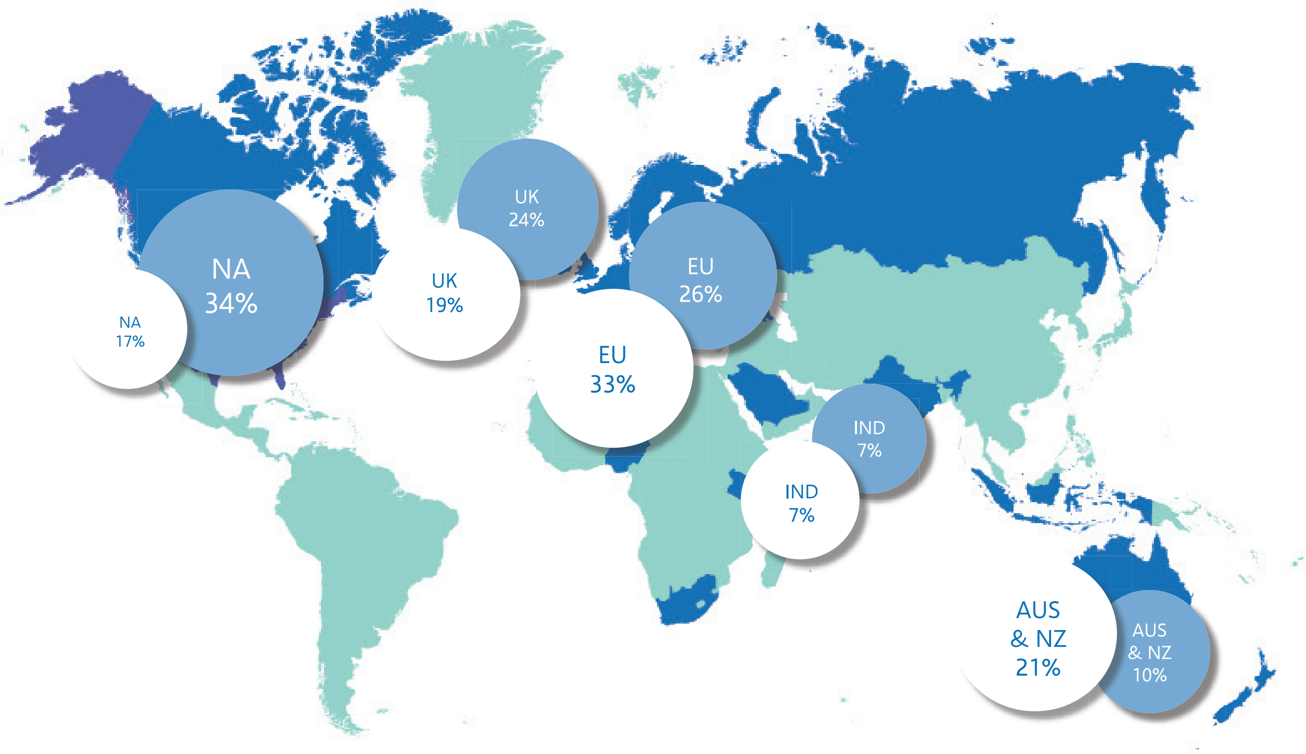
Value stays steady

There are two options that do not suffer the apparently inevitable downwards trend: Showing value and Consulting more deeply with the business. We take these as being the 'Impact duo', as ideally L&D departments would first consult with the business to understand its needs and then use the results of these consultations to show the value of what they have done to the business.

Over the past 7 years, these two options have stayed resolutely in the middle of the table, and since 2019 they have even shown a slight increase (0.9%) in their average vote. This does not mean that L&D departments are necessarily improving in their efforts in this area, only that these ideas are considered important. However, in contrast to the declining Curation – a good idea that remains largely unimplemented – these options remain 'hot' in people's mind. Clearly there is something different about them.



How ideas spread



Share of the overall vote for micro learning from each region 2016 2017

Why do some ideas become 'hot'? Not due to their intrinsic merit. Many good ideas go unsung. It is because people talk about them. How does that happen? The story of how micro learning grabbed our attention in 2016 and 2017 provides a useful illustration.

The story starts in 2015. The idea of delivering small packets of content was not new, but this was the year that the idea of micro learning took off. In Q1, micro learning company Grovo (which would copyright the term 'microlearning' the following year) raised $22m, precipitating a series of similar raises, almost entirely in US companies. A fair amount of that money went into marketing and sales, which raised domestic interest in micro learning, so that by the time the GSS 2016 survey was launched in December 2015, micro learning was on everybody's minds. The result: it topped the table in the US, while barely making the top half of the table in the UK.

Globally, the difference was stark: in the 2016 survey, 34% of all the votes cast for micro learning came from North America (see map). Over the year, the wave of interest spread across the globe and by the 2017 survey, interest had spread: 33% of the micro learning vote came from Europe, and just 17% from North America. And while the vote that year had risen across the world, in the US it had already dropped, with Micro learning toppled from the #1 position. Currently, it lies at #10 on the global table.

In 2015, micro learning was often presented as the future of L&D. While it has not since supplanted other delivery mechanisms, it is now a widely used part of the L&D armoury. This is a familiar story of enthusiasm followed by realism and adoption. The question for us in 2023 is simple: we have seen huge interest in AI, triggered by ChatGPT. It is also billed by many as the transformative future of L&D. Is it, truly? Or will it fade away down the table and become simply another of the many tools used by L&D?

The return to data

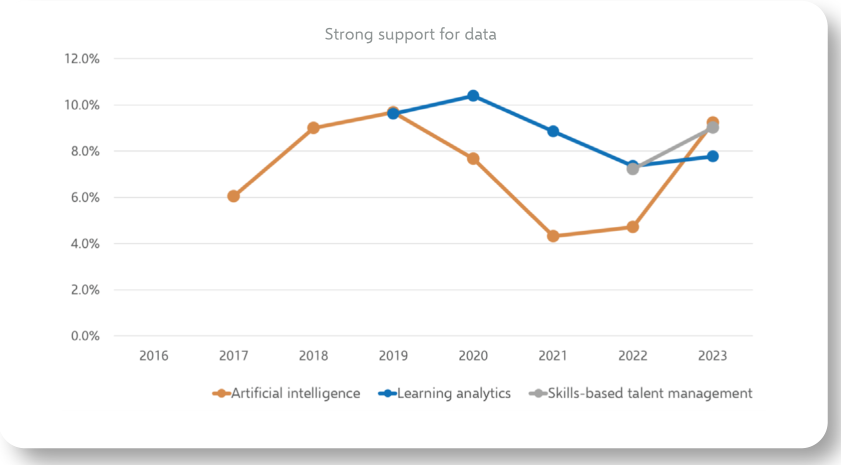
We added Artificial intelligence (AI) to the voting options in 2017. It followed the usual pattern for new options – an initial rise in popularity followed by a slow decline, moving from #8 to #2 over two years, then falling to #12 last year. This year it recovered to #2. What happened?

This huge reversal in sentiment towards AI has a clear cause. On 30 November 2022, OpenAI provided open access to the latest iteration of its large language model. From that moment, general interest in ChatGPT and AI exploded – an interest L&D was part of.

That shift in interest was unprecedented over the 10 years of the survey. The move from #12 to #2 required a leap of 4.5% in votes. The largest reversal previously was just 1.1%.

Extraordinary as this change in sentiment is, it should not detract from a larger, possibly more important story. As the graph shows, the reversal in sentiment towards AI began last year, when the previous descent levelled off. Although this year's rise was propelled by ChatGPT, the move was already underway.

And it wasn't just AI that rose up the table this year. As the graph shows, Learning analytics and Skills-based talent management also headed up the table. There is more here than simply a fascination with AI. These results suggest a shift in mindset towards the idea that data can be powerfully applied for the benefit of L&D. In contrast, Collaborative/social learning – one of the few options to rise during the pandemic – fell by 2.1% from #2 to #5, the greatest fall of any option on the table this year.



This fall is the clue to the major story this year. The meteoric rise of interest in AI is symptom of a larger story – a story about a post-pandemic shift in sentiment towards data. This is something that the survey reflected in 2020, when Learning analytics topped the table, and AI was #5. In some ways it is almost as if the pandemic never happened.

If L&D's attention has reverted to its concerns of 2020, does that mean that it has effectively dealt with the concerns of the pandemic? Anecdotal evidence suggests otherwise. Organisations are still adjusting to the world of hybrid work and remote learning. We are left asking the recurring question: is this new interest in data and AI part of a concerted, long-term change, or is L&D once again fascinated by the latest trend, only to shift its focus onto something else next year?

The challenges ahead

This is the second year when respondents could reply in free text to an optional question about the practical issues around their work:

'What is your biggest L&D challenge in 2023?'

Some 40% of respondents, 1,614 people, chose to reply in a total of 18,018 words. Although we do read each of the comments, here we will largely focus only on a word count analysis. In this analysis we exclude the following words: 'learning', 'development', 'L&D', 'challenge', 'biggest', 'learn', 'new' and 'work'. Although these occur commonly, they do not carry any particular meaning in response to the question.

Key word analysis

We analyse the responses for a set of 42 words from the most commonly occurring, 'train' (157 times) to the least, 'meta' (3 times). Of those words, the most commonly occurring word/word stems are shown in the table, with their frequency of occurrence. (Note that these may be words or word stems, so that 'train' covers 'train', 'training', 'trained' etc, and valu~ valuing, value etc.)

Occurrence frequency
train (9.7%)
business (8.7%)
skill (8.1%)
time (7.3%)
budget (6.6%)
valu~ (6.4%)

Some words were used much more or less frequently this year than last, as shown in the table to the right. This table shows how much more frequently some words were used in the 2023 survey vs 2022. The words selected all occur in at least 50 comments in the 2023 survey.

Increased frequency vs 2022		
Word	Increase	Occurrence
budget	155%	177
valu~	74%	103
impact	42%	63
creat~	41%	72
business	17%	140
train	14%	157
employee	14%	70
time	9%	118

Budgets and the business

The three words used most this year vs last year are: 'budget', 'impact' and 'value' (in its different forms). 'Business' was also used more this year than last, and this all points to one conclusion: respondents feel their budgets may be under threat this year, and believe they will need to justify their existence to protect them. Here are some unedited comments from respondents:

- my biggest challenge will be balancing what the business wants and what we need to do. i think we will have to work beyond or without budgets and start to think creatively about how to delivery impactful training that the business can understand.
- getting budget for workplace l&d
- showing value to the business, so that they are willing to contribute the budget that enables us to provide the learning opportunities.

Often these comments are set against an uncertain future – either for the business or in a larger economic sense:

- providing l&d during a recession and the anticipated budget cuts
- showing value and pushing innovation at a time of economic uncertainty
- keeping or bringing l&d up the value/priority chain. budgets are tight post covid & recessions looming. training is still seen as a line on a spreadsheet rather than a valued & strategic part of the business & therefore easy to 'drop'.

Very often the need to influence the business is highlighted:

- convincing senior leadership of what they really need to support and add value to the business, rather than what they personally like and is in vogue. business alignment vs easy popular headlines!
- showing value to the business for ongoing training of the existing workforce, when the business is purely focused on hiring & training new staff.
- showing the value of l&d in meeting the challenges of working in a hybrid model and the expectations from business leaders on what we can deliver.

A focus on delivery

Many respondents were concerned with familiar mechanics of traditional delivery of training. This can be seen in the frequency of use of 'train', 'time' and 'employee', and the increase in their use against last year. The comments reflect the daily struggle many L&D practitioners have in just getting the job done:

- to schedule for training, employee last minutes drop the class due to work schedule change
- no time to attend the course
- to gather employee for a face-to-face training program due to working different shift.
- getting sme [Subject Matter expert] support in creating / sharing content and providing mentoring services.
- to create a more efficient workflow. getting more people in the company to use our services.

No longer a challenge?

Technology does not feature greatly in the challenges reported by our respondents. AI was mentioned just 28 times, LMS 10 and LxP just 9. This is not to say that technologies do not represent a challenge for L&D practitioners, but overwhelmingly the issues reported in these comments are about people – employees, managers and stakeholders – and about the resources to do the job, be that money, time or skilled staff.

One other category of challenge that was less evident this year: pandemic-related issues. This was a strong theme in the 2022 survey, as L&D practitioners sought to build a way to support learning in a new environment. This year, 'online', 'digital', 'virtual', 'hybrid' and 'covid' appeared an average of 62% less often in the survey. This does not mean that we have necessarily solved the problems created by Covid-19, only that other, larger concerns have taken their place.

Conclusions

Time for L&D to step up

The Survey shows sentiment in Learning and Development – what people are excited about, and what concerns them. In this case, the answer is quite clear. They are excited about data, and its use in AI, skills management and analytics. They are concerned about strategy and delivery and increasingly concerned about budgets and showing impact.

As always, this information prompts further questions. The key one is this: what shape will this interest in AI take, and how well distributed will it be? Will it be, as with Curation, something that excites L&D practitioners for a year or two before the interest fades? Or will it be like Mobile delivery, something that moves from initial excitement to general use? Will Workplace L&D's interest in AI continue to lag behind that of Education, or will it catch up?

And there is a further, crucial question: if we assume that data and AI are here to stay and will have a transformational effect on how we live, work and learn, is L&D ready?

The version of ChatGPT, which so astounded people in November 2022, is already out of date. It is currently possible to create courses much faster and cheaper using AI than doing so by hand and things are moving so fast that it is impossible to guess what we will be able to do by the end of 2023.

If L&D sees its job as being what it has traditionally been – the creation and distribution of content – then it will be under threat by AI systems which can create text, images, synthetic video and more on demand. Experts in experience design will still be required, but just as the powered, programmable Jacquard loom spelt destitution for skilled weavers in the early nineteenth century, so AI is likely to fundamentally change the lives of those who have dedicated themselves to creating learning content by hand.

AI heralds a new era of how we work, live and learn. Is L&D ready?

Organisations will need skilled people and L&D more than ever in this AI-fuelled future, but the role will change towards the more challenging areas of our field – the areas highlighted in response to the question 'What is your biggest L&D challenge in 2023?'.

L&D will need to show the value of learning and its impact on performance. We will need better relationships with stakeholders to make learning part of daily work and to secure and protect budgets. The respondents to this survey are right to have identified those as the key challenges of the future. The question is whether we are ready and able to tackle them.

Caveats

The following caveats apply to the collection of data for the L&D Global Sentiment Survey, an anonymous, online poll. Please also see *Interpretation* to understand what we can and cannot legitimately understand from the survey, and the analysis in this report.

Respondents are largely unqualified

We do not know for certain that 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 tech-savvy

Most respondents choose to participate following an invitation 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 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 – we would have no guarantee respondents would actually use the given definitions. However, 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, Semcon. 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.

Artificial intelligence
Software that uses algorithms to interpret data and user inputs to provide support for learning, via, for example, content creation, chat-based coaching and 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.

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
Discussing with, and listening to, the organisation to really understanding the constraints on performance. The aim of this consultation: to facilitate and enable improved performance via a range of means, including, but not limited to, learning and development.

Learning analytics
Used since at least 2012 in the educational field, in workplace learning, it covers 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 content 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.

Mobile delivery
Resources that people can access from mobile devices, whenever and wherever suits them.

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 the moment of need, rather than in advance.

Personalization/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. benefits that arise from those 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).

* New in the 2023 survey

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About the author

Donald H Taylor is a veteran in the fields of learning and development and learning technologies, with 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 globally. His annual L&D Global Sentiment Survey, running since 2014, attracts responses from thousands of respondents worldwide.

He brings his broad understanding of the field to Emerge Education, an early stage Venture Capital fund, where he chairs the Workforce Development board, 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 as **Donald H Taylor** on Twitter and LinkedIn and at **www.donaldhtaylor.co.uk**.

Learning and Development

Global Sentiment Survey

2023

For more on the Global Sentiment Survey, go to:
www.donaldhtaylor.co.uk/the-research-base/

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