AI is here.
What's next?

By Donald H Taylor

Foreword

The past is a poor guide to the future

When the results of last year's L&D Global Sentiment Survey were announced, I made a confident prediction. The results of the 2025 survey would be very different. The unprecedented surge in interest – which had seen Artificial Intelligence soar to the top of the table – was a one-off. Although I never made predictions, on this one point, I was confident: in the 2025 survey, interest in AI would fall. It would have to. Nothing in the 12-year history of the survey had seen an option shoot so high so fast.

I was wrong.

Interest in AI has only strengthened since the last survey. This year, it tops the table once again, with a higher vote.

Perhaps I should not have been surprised. After all, if the meteoric rise in the popularity of AI was unprecedented, why should the past be any guide to what happened next?

This immense, unprecedented interest in AI is, rightly, the headline story of the survey. But what lies beyond that headline? Our one obligatory question is: 'What will be hot in workplace L&D in 2025?' Respondents choose up to three options from a list of 16. From day one of the survey, AI held the top spot, but what happened with the other 15 options?

At the top of the table, options which centre on using data have held on to the top five places. Does this signify a shift in L&D's view of its role?

Further down the table, there is more. Only three options other than AI rose significantly this year. Those three all relate to L&D providing and showing its value. This focus on value is something new.

That shows something significant about the mindset of L&D today, something echoed in the answers to the optional question: 'What is your biggest L&D challenge in 2025?'. The responses to this open-text question show that L&D has a better-informed view of AI this year. It also shows L&D as worried less about the tactical issues of delivery and more about the bigger picture of strategic and organisational challenges.

The aim of the survey and this report is not to provide answers. It is to provide information and analysis and with them, to provoke discussion. Once again, this year, we have included suggested questions to consider when reading this report. Whether reading alone or with others, we hope these will encourage further thinking about the future of L&D.

As always, please treat these survey results with caution. This survey is about sentiment. Fervent feelings about AI do not predict its future. We have included a section on interpretation to stress the value and limits of the survey results. Please do read this section and approach claims made based on the survey results with informed caution.

I must thank our sponsors. This survey would not have been possible without OpenSesame, Speexx, Netex, getAbstract, HowNow, and Colossyan.

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The questions

The L&D Global Sentiment Survey (GSS) has run annually since 2014, with voters invited to participate via email, social media, and direct messaging. The 2025 survey ran for 60 days, from 3 December 2024 to 31 January 2025, with one obligatory question:

What will be hot in workplace L&D in 2025?

There were also three optional questions:

Q2 In what country do you work? Multiple-choice, answered by almost 100% of respondents.

Q3 What is your biggest L&D challenge in 2025? Free text, answered by 85% of respondents.

Q4 Where do you work? Multiple-choice, answered by 92% of respondents.

The big question: 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 26 for a definitions list.*
- *For caveats around the methodology, see page 25.*

The big question: 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

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. It has just one obligatory question, unchanged each year, which can be read and answered rapidly and instinctively. In 2025, over 60% 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 of the Everett Rogers Diffusion of Innovation Curve, among the Innovators and Early Adopters. The survey's results over the years support this; ideas that were initially 'hot' and highly placed often become more widely adopted a few years after they first register on the survey.

Not every new idea that achieves popularity on the left of the curve goes on to be more widely adopted. However, every methodology and technology that 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 mostly solicited by email, supported by a social media campaign, and mostly on LinkedIn. Slightly over 40% 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 *country/regional* partners are focused on a particular geography.
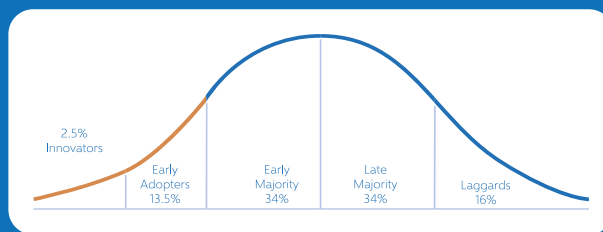

Figure 1: Diffusion of innovation curve, Everett Rogers

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 has been added. This year, however, no change was made. Following the huge success of AI in 2024, we wanted to see how respondents would react to exactly the same list of options one year on. None of the questions nor the options are defined. Nine versions of the survey were run: four surveys in English, surveys with the questions and options in both English and Thai, Indonesian and Mandarin, and one purely in French.

Voting patterns

Respondents can vote for up to three options, with 95% choosing three. Just 1.5% 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 that examines L&D sentiment at scale over a protracted period. Like all surveys, however, 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 2025?', does not show L&D's plans for 2025, only 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. This action, however, may not occur for years.

Similarly, the optional question, *'What is your biggest L&D challenge in 2025?'*, shows people's concerns at the start of the year, not their plans to solve them.

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 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 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 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 VR and AI following similar paths of interest from 2018 to 2022 – first up and then down – and be unable to explain the sudden leap of support for AI in 2023 while VR's vote continued downward. If we know about the launch of ChatGPT in November 2022, coupled with the normalisation of the use of VR, that context helps us understand the voting patterns. Data never exists in isolation from context.

This context is often location-specific, and we thank the country partners and sponsors who take the time to discuss the results with us. There is no substitute for hearing what these tables and graphs mean to the people doing the work on the ground.

How is the survey useful?

We believe that the main role of the survey is to provoke questions rather than provide answers. We're told L&D departments use the report to consider their peers' thoughts and challenges. It's a tool for provoking conversation about strategy and direction, particularly at the beginning of the year, and particularly in times of change.

Who voted?

A worldwide view

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

3,339 people from 93 countries voted in this year's survey, spread across the nine regions shown.
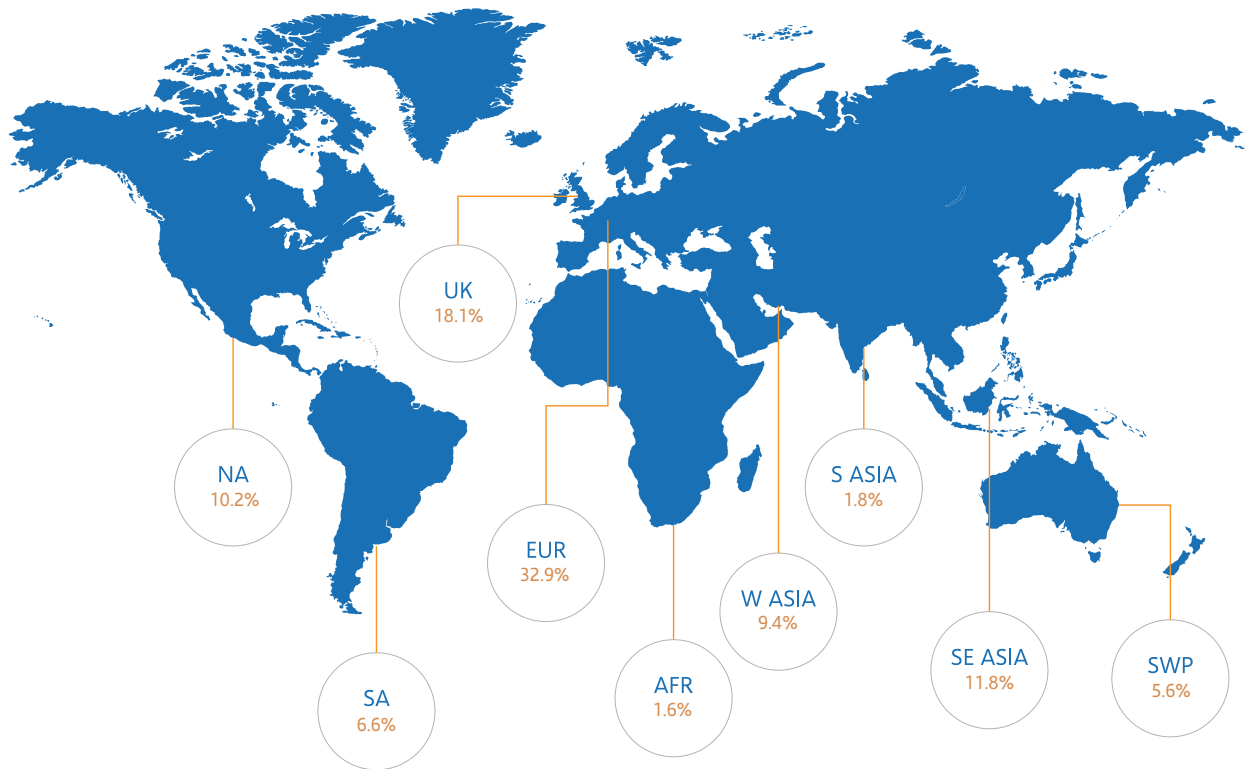

Figure 2: Distribution of votes worldwide

Map labels:
- UK 18.1%
- NA 10.2%
- SA 6.6%
- EUR 32.9%
- AFR 1.6%
- W ASIA 9.4%
- S ASIA 1.8%
- SE ASIA 11.8%
- SWP 5.6%

Where people work

92% of voters chose to answer the question *'Where do you work?'*

Legend:
- Workplace L&D
- Other
- Consultant /freelancer
- Vendor
- Education

Donut values: 48%, 16%, 9%, 19%, 8%
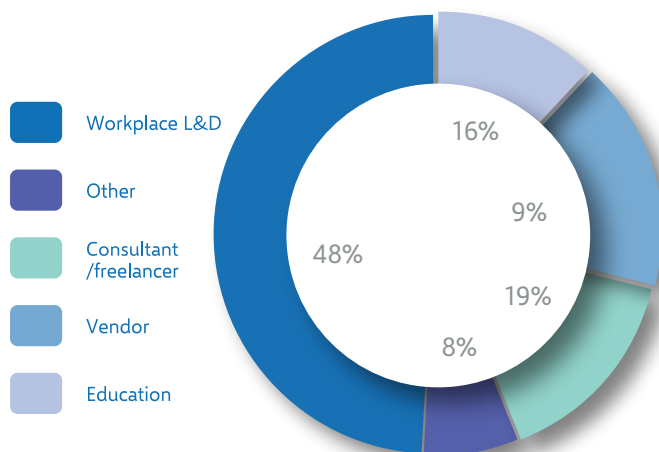
Figure 3: Where respondents work

16 key countries

The 16 countries with the greatest numbers of respondents accounted for 77% of the total vote:

United Kingdom	605	Indonesia	114
United States	274	Poland	108
Ireland	193	Belgium	105
Brazil	185	Cambodia	93
Türkiye	158	Italy	92
Australia	150	Sweden	84
Netherlands	142	Israel	82
Malaysia	124	Spain	79

Figure 4: Key countries

The results

The three takeaways for this year's results are:

- AI dominates
- Data holds on
- 'Value' returns

AI's dominance started in the 2023 survey, which opened one week after the launch of ChatGPT. In last year's survey, it reached a high of 21.5%, only to break that record this year. We explore AI in more detail on pages 15 to 16.

But AI's dominance is not the only story in this year's results.

When one option on the survey collects so many votes, fewer remain for other options. Last year, the impact was clear. Every other option on the table fell. Only Personalization/adaptive delivery rose substantially, likely due to an association with AI. While personalization held its vote this year, two other options associated with AI fell – Reskilling/upskilling and Learning analytics. This left the top 5 positions of the table, all associated with data, unchanged, but only just. Immediately below the top 5, there was some dramatic change.

In positions #6 and #7, Consulting more deeply with the business and Showing value demonstrated solid increases over last year's vote, as did Performance support at #11. These three options, the 'value trio', typically behave differently from the other options on the survey. Last year, they suffered a dramatic decline but are the only options to bounce back this year. Why? We explore this more on pages 17 to 18.

#	GSS 2025		Δ	Δ %
1	Artificial intelligence (1)	22.6%	⊕	1.1%
2	Reskilling/upskilling (2)	10.0%	⊖	-1.0%
3	Skills-based talent management (3)	8.9%	—	0.0%
4	Personalization/adaptive delivery (4)	8.2%	↑	0.1%
5	Learning analytics (5)	6.9%	⊖	-0.9%
6	Consulting more deeply with the business (9)	6.5%	⊕	1.1%
7	Showing value (10)	6.2%	⊕	1.2%
8	Coaching/mentoring (6)	5.7%	↓	-0.2%
9	Micro learning (8)	5.4%	↓	-0.4%
10	Collaborative/social learning (7)	5.3%	↓	-0.5%
11	Performance support (13)	4.3%	⊕	1.0%
12	Learning experience platforms (11)	3.7%	↓	-0.6%
13	Virtual and augmented reality (12)	2.7%	↓	-0.6%
14	Cohort-based learning (15)	1.5%	↓	-0.1%
15	The Metaverse (14)	1.1%	↓	-0.5%
16	Other (16)	1.0%	↑	0.2%

n = 3.339 *(Figures in brackets show position last year)*

Figure 5: Main results for GSS 2025

Key takeaways

AI dominates sentiment in L&D – again

Last year, interest in AI hit an unprecedented 21.5%. Then, this year, the vote for AI hit 22.6%, the highest in the 12-year history of the survey. Figure 6 shows the votes for AI since 2017, when it was added to the list of options, against the vote for the top-ranked option.
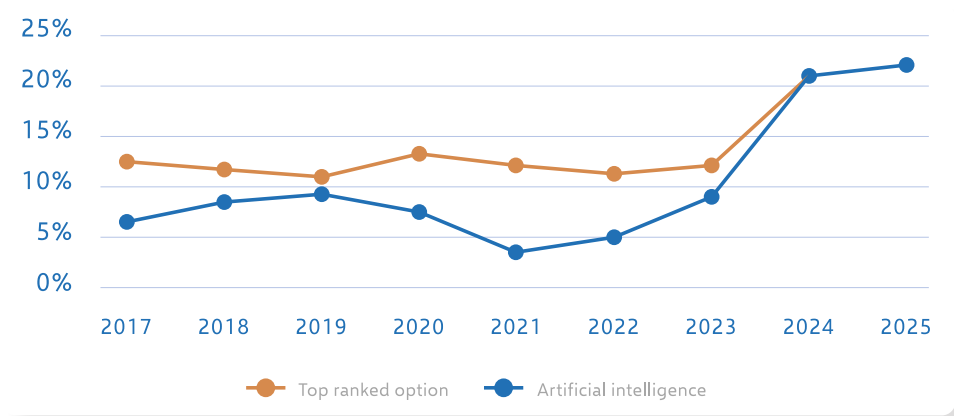

Figure 6: Votes for #1 and AI, 2017-2025

The chart shows AI following the normal pattern for options on the survey up to 2021: an initial surge of interest that then fades as popularity declines over time. AI's resurgence in popularity since the 2023 launch of ChatGPT is well documented and is reflected in the responses to the survey.

This year, each of the 16 key countries ranked AI #1 on their results (for a list of key countries, see page 7). AI also topped the preferences of each of the five workspaces. In each case, the vote exceeded 20% and was greater than last year (see Figure 7).

Votes for AI	2025	2024
Workplace L&D	21.7%	20.3%
Consultant/freelancer	23.0%	21.8%
Vendor	23.3%	23.1%
Education	25.3%	24.0%
Other	22.9%	22.6%

'AI is still everybody's favourite.'

Figure 7: Votes for Artificial Intelligence across workspaces, 2024 and 2025

On page 15 to 16, 'AI: much more than another technology', we explore what has happened with AI over the past year and what this may tell us about its future use in L&D.

Data holds on

This year, for the first time, the top five places on the table remain unchanged. As noted in previous reports, these five options all rely heavily on data and reflect a shift in L&D's focus away from delivery mechanisms such as Learning Experience Platforms. But support for these data-focused options, while strong, is not homogenous. It varies greatly geographically.

Figure 8 shows the spread of votes for the top five options. AI was ranked #1 by both The Netherlands (25.1% of the vote) and Cambodia (15.4%), but the difference between their votes was a substantial 9.6%. The gap between the spread of votes for Personalization/adaptive delivery between Indonesia (3.1%) and Italy (13.9%) was even wider.

The top 5 positions on the main table may be unchanged, but that does not mean they are equally supported internationally.
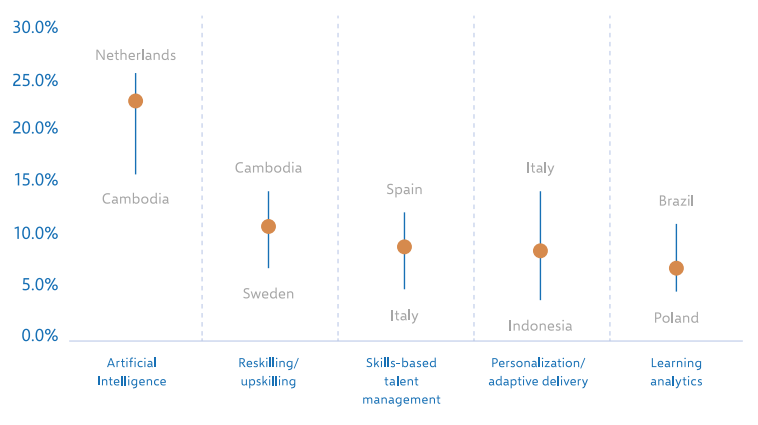
Figure 8: Spread of votes for top 5 options
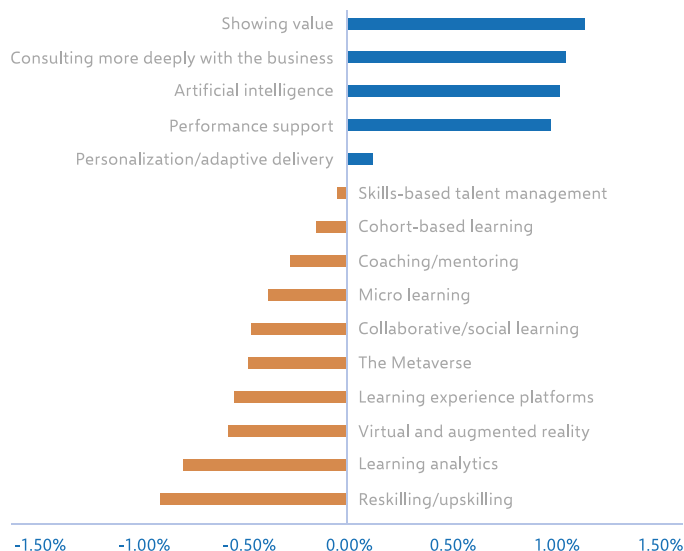
Figure 9: Changes in votes 2024-2025

'Value' returns

With AI dominating the voting, fewer votes were available for other options. Despite this, and in contrast to last year, three other options increased their vote substantially: the 'value trio' of Showing value, Consulting more deeply with the business and Performance support. Last year, like almost every other option, they lost votes, but they are unique in almost recovering their position this year. See 'The return of value' for more.

The view across workspaces

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

GSS 2025 Workplace L&D		
1.	Artificial intelligence	21.7%
2.	Reskilling/upskilling	10.3%
3.	Skills-based talent management	10.1%
4.	Personalization/adaptive delivery	8.1%
5.	Consulting more deeply with the business	7.4%
6.	Learning analytics	7.3%
7.	Showing value	6.6%
8.	Coaching/mentoring	5.6%
9.	Collaborative/social learning	4.9%
10.	Micro learning	4.8%
11.	Performance support	4.4%
12.	Learning experience platforms	3.3%
13.	Virtual and augmented reality	2.6%
14.	Cohort-based learning	1.4%
15.	The Metaverse	0.8%
16.	Other	0.6%
n = 1,448 *(47% of those responding)*		

GSS 2025 Consultant/freelancer		
1.	Artificial intelligence	23.0%
2.	Reskilling/upskilling	10.8%
3.	Consulting more deeply with the business	8.2%
4.	Personalization/adaptive delivery	7.9%
5.	Skills-based talent management	7.6%
6.	Showing value	6.9%
7.	Coaching/mentoring	6.6%
8.	Collaborative/social learning	6.5%
9.	Learning analytics	5.9%
10.	Micro learning	4.3%
11.	Performance support	4.2%
12.	Learning experience platforms	3.2%
13.	Virtual and augmented reality	1.8%
14.	Cohort-based learning	1.3%
15.	Other	0.9%
16.	The Metaverse	0.8%
n = 597 *(19% of those responding)*		

Figure 10a: Share of votes across workspaces

All workspaces rated Artificial Intelligence as the most important option. Beyond that, the considerable variations between workspaces illustrate the differences between them.

Personalization/adaptive learning

As it did last year, Education rates personalization highly, but not a high as the Vendors, perhaps because personalization is a well-publicised benefit of using AI in L&D. The interpretation of 'personalization', however, will differ between educators and vendors, and possibly others. It may be that the broad appeal of this option, and its solid showing on the survey, is the result of it meaning many different things to many different people.

Consulting more deeply with the business

This option is usually associated with 'Showing value' – the idea being that L&D should first consult with the business and then, after a learning intervention, show the value that has been delivered. However, while this association is clear in Workplace L&D and Consultant/freelancers, among Vendors there is a wide gap between the options. It may be that vendors see consulting with their clients as not 'hot', but an essential part of their work.

GSS 2025 Vendor		
1.	Artificial intelligence	23.5%
2.	Personalization/adaptive delivery	10.9%
3.	Showing value	10.5%
4.	Reskilling/upskilling	8.5%
5.	Skills-based talent management	7.7%
6.	Learning analytics	6.3%
7.	Consulting more deeply with the business	6.3%
8.	Micro learning	4.9%
9.	Performance support	4.9%
10.	Collaborative/social learning	3.9%
11.	Coaching/mentoring	3.7%
12.	Virtual and augmented reality	2.5%
13.	Learning experience platforms	2.4%
14.	Cohort-based learning	2.1%
15.	Other	1.3%
16.	The Metaverse	0.6%
n = 273 (9% of those responding)		

GSS 2025 Education		
1.	Artificial intelligence	25.4%
2.	Personalization/adaptive delivery	8.7%
3.	Reskilling/upskilling	8.4%
4.	Micro learning	8.0%
5.	Learning analytics	7.6%
6.	Skills-based talent management	7.6%
7.	Collaborative/social learning	7.0%
8.	Coaching/mentoring	5.3%
9.	Learning experience platforms	4.8%
10.	Virtual and augmented reality	4.4%
11.	Showing value	3.2%
12.	The Metaverse	2.5%
13.	Consulting more deeply with the business	2.5%
14.	Performance support	2.4%
15.	Cohort-based learning	1.3%
16.	Other	0.9%
n = 491 (16% of those responding)		

Figure 10b: Share of votes across workspaces

Showing value

All workspaces rank this option highly apart from Education. One explanation for this could be that showing the value of work is seen as something only for the corporate sector. It could also be that Education believes adding value is the core of its role: something so fundamental that it is unlikely to be seen as 'hot'. Vendors also rank this option highly, but it is not clear whether they believe showing value is something for themselves or for their customers.

Questions

- How do you interpret the word 'personalisation'? How do you think others might interpret it, and what can you take from that?

- If you work in workplace L&D or for a vendor, what do you make of the different rankings given by each for Showing value?

- Do you agree with the rankings of the options for your workspace? What would you change?

The global view

Belgium
Consulting more deeply with the business — 9.9%

The Netherlands
Performance support — 8.5%

Poland
Virtual and augmented reality — 8.0%

United Kingdom
Showing value — 9.9%

Türkiye
Learning experience platforms — 7.2%

Cambodia
Reskilling/upskilling — 13.5%

United States
Cohort-based learning — 2.8%

Spain
Skills-based talent management — 12.5%

Italy
Micro learning — 12.7%

Brazil
Learning analytics — 11.0%
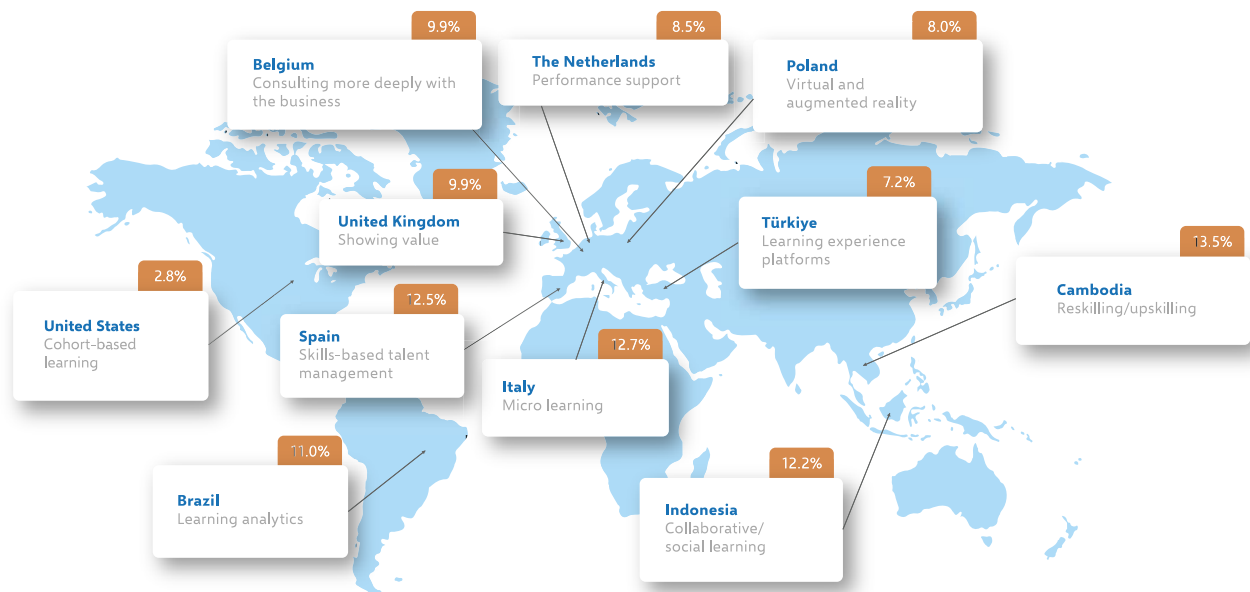
Indonesia
Collaborative/social learning — 12.2%

Figure 11: Highest votes for selected options in key countries

Forget AI for a moment. What about the other options on the table? Which countries were enthusiastic about them? Here we explore which of our key countries voted for things other than AI. We've chosen 11 options, and Figure 11 shows which countries were the source of their greatest number of votes. (For a list of key countries see page 7.)

Some countries are always particularly focused on particular options. As always, The Netherlands was the country most enthusiastic about Performance support, delivering the highest vote for it since 2021. Meanwhile, the UK was again the strongest supporter of Showing value – this time with its largest vote in 12 years.

Italy's huge support for Micro learning of 12.7% was in contrast to the United States's low 3.7%. In the past, the USA has often provided the highest vote for Personalization/adaptive delivery. Not this year – it ranked sixth. It did, however, provide the strongest vote for Cohort-based learning.

Virtual and augmented reality have always been well supported in Poland, where there is a burgeoning network of experts developing VR content and systems. Similarly, Türkiye has a vibrant market for Learning experience platforms, with both established and new entrants.

For the first time this year the survey received a surge in votes from Belgium, as a result of support from the VOV Learning Network. The Belgians provided the highest vote for Consulting more deeply with the business.

Another country registering significant votes on the survey for the first time this year was Cambodia, thanks to the work there of Kong Pheaktra (Peter), Founder of L&D Cambodia and local partners eLearningMinds. Cambodians put in the greatest support for Reskilling/upskilling. The other option focused on skills is Skills-based talent management, which received its greatest number of votes from Spain.

Collaboration and personalization in the Americas

Once, Brazil would have been the uncontested leader of votes for Collaborative/social learning, but this year it was Indonesia that voted most strongly for this option. Instead, Brazil voted most strongly for Learning analytics, a 3.4% increase on last year's vote, and the highest vote for it in the five years we have been collecting votes from Brazil. Collaborative/social learning was relegated to #6 having been #2 last year and #1 for the previous three years. The top options on Brazil's table were the same data-focused options as on the global table.

For the past four years, one thing was constant on the GSS: Brazil would rank Collaborative/social learning high, well above Personalization/adaptive learning. This year, however, for the first time personalization topped collaboration (see Figure 12).
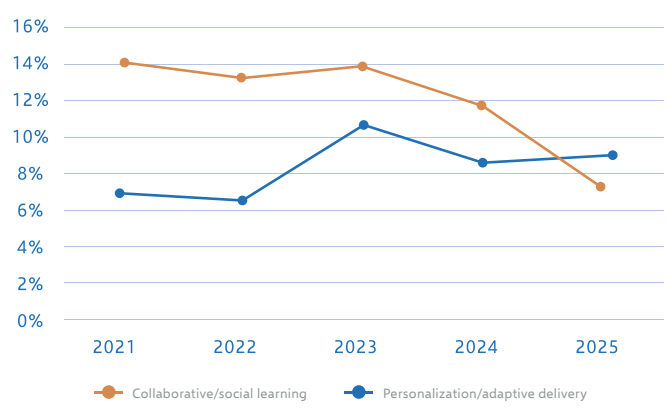

Figure 12: Collaboration and personalization in Brazil, 2021-2025

Brazil's past enthusiasm for Collaborative/social learning contrasted with the USA, which always ranked Personalization/adaptive learning much higher. Last year, for example, the difference in voting was 8.8%. This year, that fell to 4.3%, thanks in part to an uptick in US votes for collaboration.

These changes have led to something that would have been unthinkable a few years ago – a dramatic narrowing of the gap between the two countries' perceptions of Collaborative/social learning.
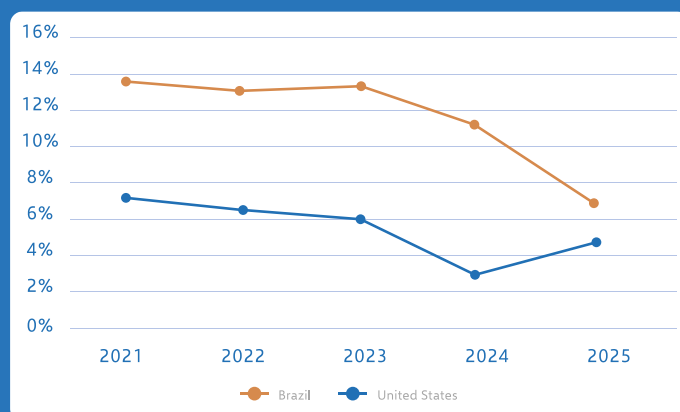
Figure 13: Collaboration converging in Brazil and USA, 2021-2025

The closing of the gap has been dramatic. Between 2021 and 2024, the average gap between the Brazilian and US vote for collaboration was 7.3%. This year, it plummeted to 2.4%. Whatever the cause, the fall in the Brazilian enthusiasm is in line with a general increase in interest in AI and related options.

Brazil was initially slow to register enthusiasm for AI. It has, however, now caught up with the global excitement around Artificial Intelligence (see Figure 16, page 16).

AI: much more than another technology

Since the survey was launched 12 years ago, the behaviour of options has been fairly predictable. They tend to start high and descend over time, moving from novelty to one of three states – general use (eg Mobile delivery), niche use (eg VR and AR) or being abandoned (eg Curation). Until recently, the only exception to this rule was the 'value trio', which seemed to stay fairly level (see page 17 for more). This pattern is clear in the descent of Collaborative/social learning from 2016 to today (see Figure 14).

The new exception to the rule is AI. From its introduction to the survey in 2017 to 2022 it followed the general pattern of a downward trend. The launch of ChatGPT in October 2022 changed all that.
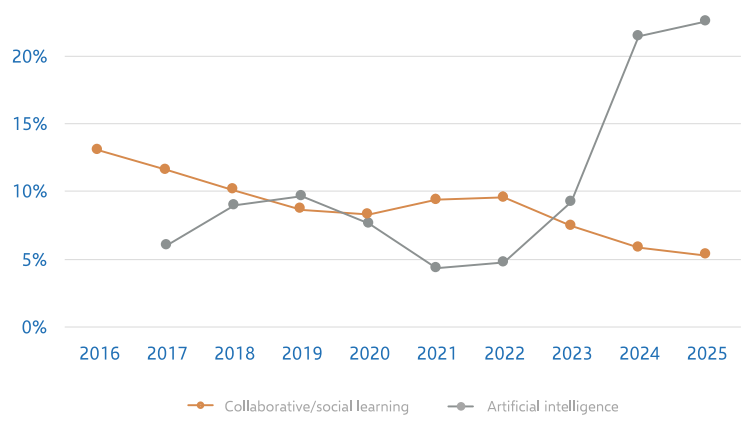

Figure 14: Votes for collaboration and AI, 2016-2025

In the immediate aftermath of ChatGPT's launch, there was a breathless period of some 18 months when new stories about AI appeared weekly and sometimes daily in online media. That pace has slowed a little, but as if to compensate, many tools in our daily lives now use – or claim to use – AI. We are familiar with ubiquitous online tools such as Microsoft Copilot and Adobe Acrobat offering AI-driven assistance. AI, however, is now part of our physical world, too. On a recent visit to Paris, I visited a small art museum. In the gift shop, a fridge magnet was on sale for eight Euros. As well as the usual image associated with the museum, it featured a QR code. That code offered the chance to chat with a long-dead French art collector, powered by AI.

This excitement and the ubiquity of AI have driven up the votes for AI in this survey to unprecedented levels, but there is a good deal more to AI than just hype and excitement. It is a fundamental tool that can be used in multiple ways.

In a series of three Focus reports co-authored with Eglė Vinauskaitė (see page 30 for details) we watched L&D's use of AI grow to over 80% of practitioners surveyed by October 2024. But what were they using it for, and what were their ambitions?
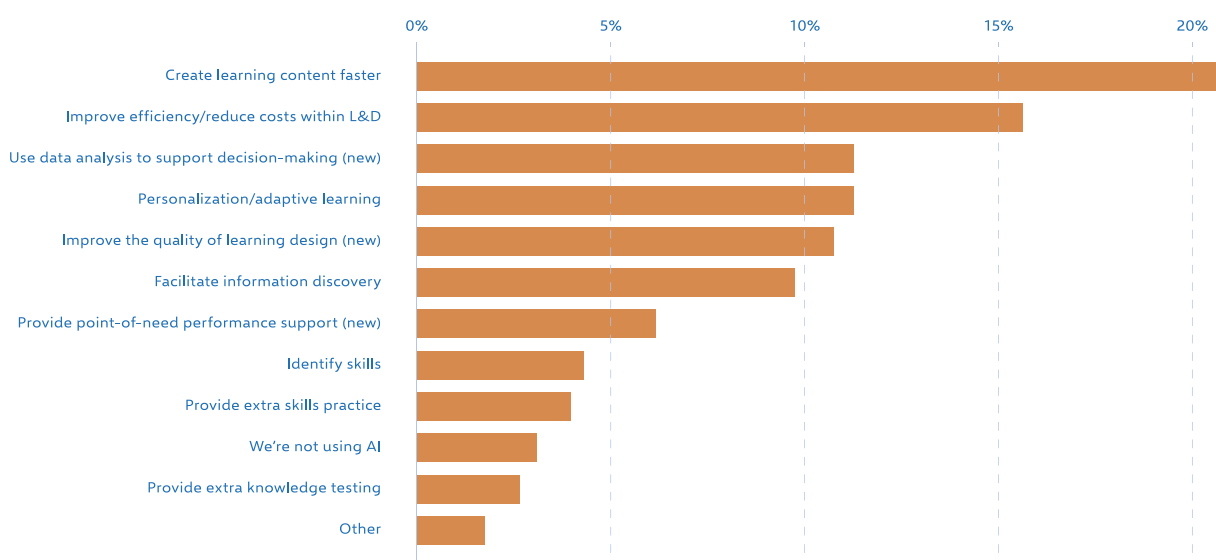
Figure 15: Expected uses of AI, October 2024

In our most recent Focus report, AI in L&D: Intention and Reality, we asked over 400 L&D practitioners how they expected to use AI (see Figure 15). The answers to this practical question were revealing. On the Global Sentiment Survey, which asks what will be hot this year, both Reskilling/upskilling and Skills-based talent management rank highly (#2 and #3 respectively). In response to the more immediate, practical question in the Focus report, however, skills make barely any impact. The option Identify skills is #8 on a list of 12 options, and Provide extra skills practice is #9. Together their scores are less than half the votes given to the most popular choice: 'Create learning content faster'. It seems that L&D is still largely focused on using AI for efficiency – to do what it already does faster, and that is to create content.

How long will AI continue to dominate our thinking? With this year's increased vote from last year's historic high, the rise of AI might seem unstoppable, but for one small indicator.

The USA usually leads sentiment around new ideas in L&D. In 2016, it ranked Micro learning #1. That year, it hit #5 on the general rankings. The following year, enthusiasm for Micro learning spread worldwide. Increased votes in almost every country pushed its ranking to #3 globally, but the vote was already in decline in the USA. By 2018, the world had followed the USA again, and Micro learning began its descent down the table.

Could something similar happen with AI? Figure 16 shows the vote for AI worldwide, in the USA and in two countries initially sceptical of AI. Last year, all were unanimous in their enthusiasm for AI, with the USA leading the voting. This year, rather than leading things, the USA's vote is the lowest of the four. It is a marked downward turn of nearly 4%. This is only one year's data, and there may be local factors driving this decline, but it is the first important hint of a possible decline in AI's popularity that we have seen since November 2022.
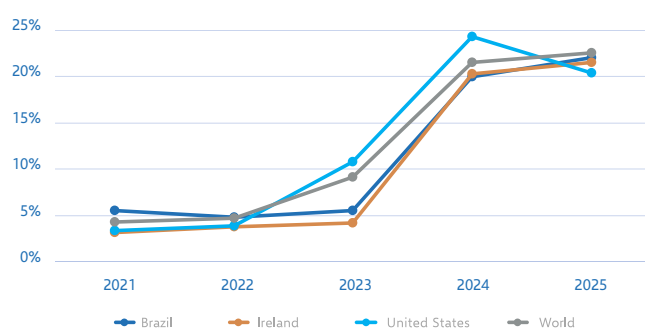

Figure 16: Views of AI in different geographies, 2021-2025

Questions

- How do you plan to use AI in L&D in 2025? What will you do beyond using it to accelerate content production?

- How do you learn about AI? Who is a reliable source?

- What are your organisation's expectations of AI?

The return to value

The 'value trio' is a set of three options that behave unlike other options on the survey: Consulting more deeply with the business, Showing value and Performance support. These seem connected in respondent's minds. Perhaps there is the sense that one consults with the business to find a problem, then provides a solution that supports performance and finally shows its value.

Between 2019 and 2023, the value trio appeared to be immune to the normal trend of options falling away over time. They maintained a position in the middle of the table, with the average of the three votes ranging tightly between 5.2% and 6.2%. Last year, however, the average of the three scores dropped to 4.6% (see Figure 16)
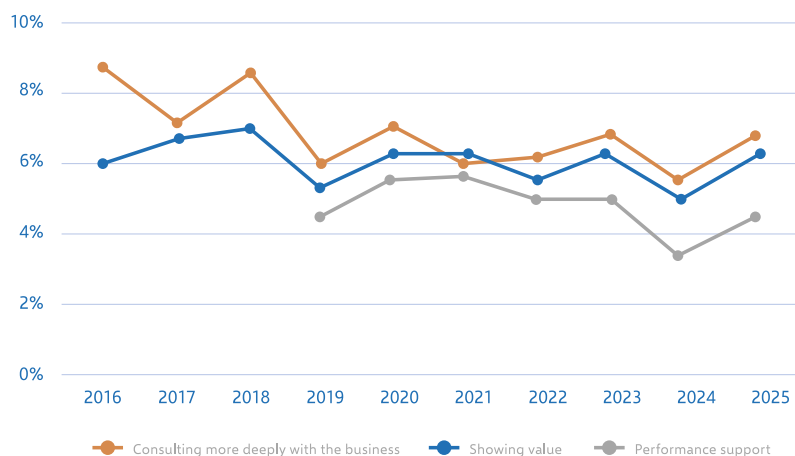
Figure 17: Votes for the 'value trio', 2016-2025

This year, however, each of the three options increased their share of the vote by at least 1%. The only other option increasing its vote by an equivalent amount was AI (see Figure 9, page 10).

Why did these three options recover their votes, while so many others did not? Anecdotally, the answer seems to be a realisation among L&D professionals that their employment is under threat from a combination of budget cuts (see The Challenges Ahead, page 21) and from AI itself.

Questions

- If you are in a workplace L&D team, is it important to you to demonstrate value?

- If you are in a workplace L&D team, or a vendor, how do you consult with the organisation/s that you serve?

Language matters

GSS 2025: English speaking countries		
1.	Artificial intelligence (1)	21.8%
2.	Reskilling/upskilling (2)	10.4%
3.	Skills-based talent management (3)	8.7%
4.	Personalization/adaptive delivery (4)	8.4%
5.	Showing value (7)	8.0%
6.	Consulting more deeply with the business (6)	7.3%
7.	Learning analytics (5)	6.5%
8.	Coaching/mentoring (8)	6.0%
9.	Collaborative/social learning (10)	5.0%
10.	Performance support (11)	4.5%
11.	Micro learning (9)	4.4%
12.	Learning experience platforms (12)	2.6%
13.	Virtual and augmented reality (13)	2.5%
14.	Cohort-based learning (14)	1.8%
15.	Other (16)	1.2%
16.	The Metaverse (15)	0.9%
n = 1,354		

GSS 2025: Non-English speaking countries		
1.	Artificial intelligence (1)	23.1%
2.	Reskilling/upskilling (2)	9.7%
3.	Skills-based talent management (3)	9.0%
4.	Personalization/adaptive delivery (4)	8.1%
5.	Learning analytics (5)	7.2%
6.	Micro learning (9)	6.0%
7.	Consulting more deeply with the business (6)	5.8%
8.	Coaching/mentoring (8)	5.5%
9.	Collaborative/social learning (10)	5.5%
10.	Showing value (7)	5.0%
11.	Learning experience platforms (12)	4.5%
12.	Performance support (11)	4.1%
13.	Virtual and augmented reality (13)	2.9%
14.	The Metaverse (15)	1.3%
15.	Cohort-based learning (14)	1.3%
16.	Other (16)	0.8%
n = 1,985		

Figure 18: Comparison of responses by language (figures in brackets show position on main table)

This year for the first time we share some analysis that we have carried out in the background for the past two years: an exploration of whether respondents' first language makes a difference to the results of the survey.

The data set is the aggregate of nine different surveys. The main survey is only in English, and generates 93% of the results. Seven of the remainder are all in English or English plus another language (Indonesian, Thai or Mandarin), with only one entirely not in English – the French version.

The 1,985 non-Anglophone respondents come from 72 countries with 47 different language (although 10 cover more than two-thirds of the respondents here). Of the Anglophone countries, six make up 97% of the 1,354 respondents: the United Kingdom, the United States, Ireland, Australia, Canada and New Zealand.

It is striking that two terms are ranked higher by English speakers than non-English speakers: Showing value, and Consulting more deeply with the business. This was also true for the 2024 survey results, so it seems unlikely to be due to a peculiarity of the data. The words 'Showing value' are not obscure, nor are they more difficult to interpret than, say, 'Skills-based talent management', so the variation in votes seems unlikely to be purely down to linguistics.

An alternative explanation is that online discussion in English between members of the Anglophone countries has reinforced a sense of importance around Showing value, and Consulting more deeply with the business, while discussion among the many language of the non-Anglophone countries is more fractured.

Whatever the explanation for this variation in voting habits, given that we have focused on these two options in this paper, we thought it important to note the difference in voting patterns here.

The long view

Again this year, AI dominates the results table. The vote for AI may fall next year (for discussion, see AI: much more than another technology), although after its second year with a record vote, that seems difficult to imagine. In the long run, however, almost all options trend downwards.

The only way is down

The normal trend is for votes to decline over time as options become less 'hot', see Figure 19. The exceptions to this are the value trio and AI, AI followed the normal downward trend until the launch of ChatGPT, as explored in more detail in AI: much more than another technology on page 15 to 16.
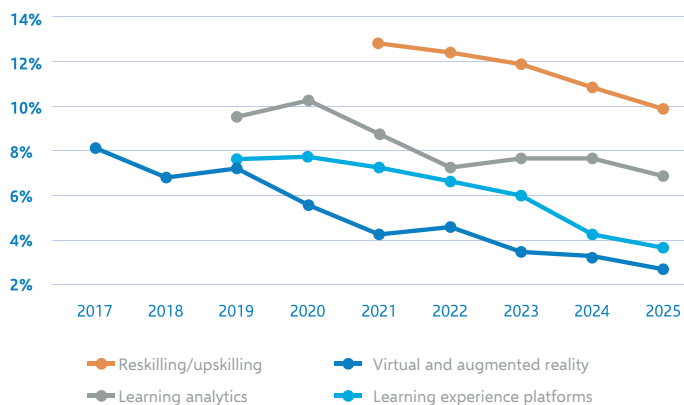
As Figure 19 shows, the downward trend applies whether we are dealing with a concept like Reskilling/upskilling, a method such as Learning analytics, or a content delivery mechanism such as Virtual and augmented reality or Learning experience platforms. Neither does it matter when an option entered the table – there will be variations on the journey, but the downward trend is clear.

Figure 19: Options trending down, 2017-2025

This downward trend does not necessarily mean an option is unsuccessful. Remember our question: 'What will be hot in workplace L&D next year?' If something loses votes, it has become less 'hot' and that is for one of three reasons.

The first is that the option goes mainstream. The most obvious example is Mobile delivery, which topped our first table in 2014 but fell steadily over the years until it was removed in 2024. Mobile delivery is no failure; rather, it is business as usual for most people, which is why it is no longer 'hot'. Arguably, Learning experience platforms are also in this category. In a few years, they have moved from edgy challenger technology to mainstream learning infrastructure.

The second reason for descent is that an option finds success in a niche, as with Virtual and augmented reality. Since this entered the voting in 2017, it has moved (especially in the case of VR) from an expensive, high-end product to a lower-cost, less complex delivery mechanism with an established group of content developers and a user base increasingly comfortable with wearing a headset to learn. It is not used as widely as mobile delivery but has carved out a valuable niche in areas where the costs of a failure to perform are high and practice is difficult, whether that is piloting a nuclear submarine or dealing with legally challenging issues in the workplace.

The third reason for a decent is that an option proved bigger and more complex than practitioners initially imagined. This has happened to both big ideas like Reskilling/upskilling and to practical approaches like Learning analytics. These are the 'wallflower' options. They look great, and are invited to the party, but nobody dances with them. After a few brief years of attention, L&D moves on to other newer, more exciting things, like AI.

A long-term contrast: personalization and collaboration

Since we settled on 16 options on the table in 2016, three key lessons have emerged: everything descends over time, nothing is entirely predictable, and meaning is not constant.

The votes for Collaborative/social learning and Personalization/adaptive learning appeared almost linked from 2016 to 2023. They were following the rule that all options apart from the value trio trend downwards over time. Between those years, the gap between them averaged 1.2% (see Figure 20). But nothing is entirely predictable on the survey. In 2024, the gap between the two had grown to over 2% and in 2025 it was 3%.
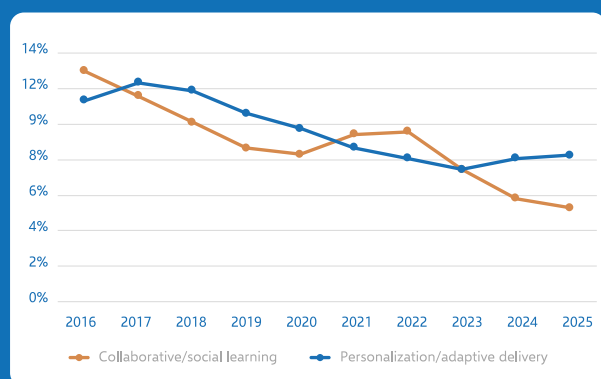

Figure 20: Two contrasting options, 2016-2025

What explains these changes in voting patterns?

Enthusiasm for collaboration rose during the pandemic, as shown in the 2021 and 2022 results. Our hypothesis is that these votes reflect a strong desire for human contact, resulting from lockdown-inspired feelings of isolation, and that this desire waned once normal mixing resumed.

The rise in interest in personalization since 2023 is almost certainly associated with excitement about AI, which holds out personalization as one of its great potential benefits. If interest in AI fades, we can expect to see to see personalisation's vote fall in tandem.

Taking the longer term, view, we should remember that the perception of these terms has changed over the decade of voting shown in Figure 20. In 2016, the idea of Collaborative/social learning very much reflected the social side of things, as promoted in Jay Cross's 2006 influential book, Informal Learning. Respondents may have associated the option with Slack and Yammer (now Viva Engage), which had undergone extensive growth in the years prior to 2016, making them hot in some respondents' minds. Now these tools and others are more regarded as part of organisational infrastructure.

Similarly, around 2016, respondents reading the term 'Personalization/adaptive delivery' may have concentrated more on the latter part of it, and its implications for designing content to adapt to different mobile devices, very much a hot topic at the time. The idea of the level of personalization made possible by today's AI would have been very far from most voters' minds.

All this serves as a note of caution in interpreting the results of the survey over time. As pointed out in Caveats, we cannot know what is in people's minds when they vote, and we cannot be sure that their interpretation of terms will remain constant over time.

"

'Technology is no longer the top challenge'

The challenges ahead

This is the fourth year that respondents were asked the optional question 'What is your biggest L&D challenge in 2025?'

Last year a record 94% of respondents answered this question. That proportion fell to 85% this year, which is still a large increase on the 40% answering in 2022 and 2023. The 2,883 people who did answer, however, were more voluble than ever, describing their challenges in 29,318 words, somewhere between the length of George Orwell's Animal Farm and John Steinbeck's Of Mice and Men.

Most (93%) of the answers were in English, the remainder in a 26 languages, of which the most common were Indonesian, Mandarin and Brazilian Portuguese.

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 groupings:

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*

It is no surprise that Technology leapt to being the top concern last year, driven by interest in AI. This year, however, Strategy, skills and talent returned to being respondents' greatest challenge.

Although attracting fewer comments, it is notable that the category covering Resources, budget and workload is the only one to have grown in significance year on year, more than doubling its share of challenges from 4% in 2022 to 8.3% today. This is marked contrast to the People category, which has shrunk each year, from 12.8% in 2022 to 9% this year (see Figure 23, below).
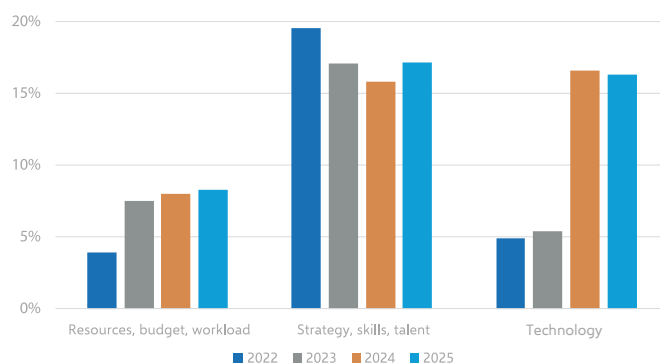

Figure 21: Challenges in resources, strategy and technology, 2022-2025

The key words

In addition to reading the responses, we analyse them for 51 key words. Excluding 'learning', 'L&D', 'challenge' and 'biggest', these are the ten most commonly occurring individual word stems. (A word stem includes all forms of a word, so 'skill' includes upskill, reskilling etc, while 'valu' includes valuing, valued etc.)

ai	464	tech	203
skill	312	chang	164
train	264	time	158
business	247	valu	151
budget	221	organi	134

Figure 22: Top 10 words used in describing challenges

Despite the impact of AI on content, concerns around it have remained constant over the past 4 years, where we might have expected it to decrease – perhaps AI is not helping with content production as much as expected.

Concerns around delivery and people, however, are trending downwards. Respondents are now less likely to use words such as 'people' and 'engagement' now than in 2022, and barely use the word 'classroom' at all – it accounted for a total of just 6 responses this year.
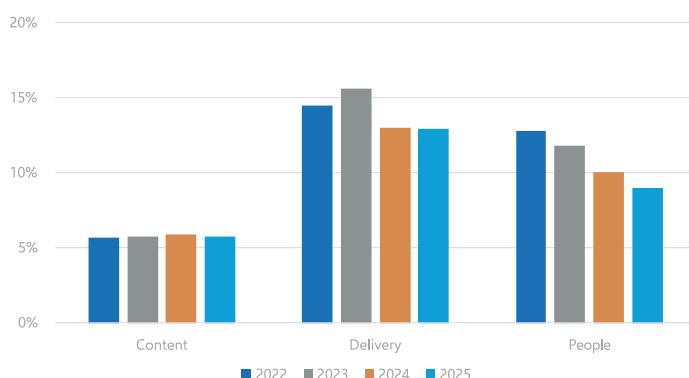

Figure 23: Challenges in content, delivery and people, 2022-2025

Some of the **2,833 challenges** shared by respondents:

"Showing value for money. keeping up to speed with technology and not getting lost in the noise. Focusing on core skills and expertise."

"With a limited capital budget, more needs to be done under the pressure of cost optimization. Integrate AI into HR and L&D systems."

"Moving from capabilities to skills; tracking business value for activities; delivering an exciting learning to a person who has access to AI tools."

"Supporting development of human skills such as critical thinking and analytical skills that help people to effectively use gen AI."

Questions

- How much do these general concerns about resources and technology reflect your own?

- The terms 'train' and 'skills' are both seen as being important – what's your reaction to that?

- Where do your most significant challenges for the year ahead come: from within the L&D department, from other departments, or from external factors, such as the economy?

Conclusions

The Industrial Revolution ran roughly from 1760 to 1830, spreading from Britain across the world and altering it forever. Work began to be mechanised, cities exploded in size and lives were transformed for good and ill. At the heart of all this change was steam, used for transportation, manufacturing, agriculture and more. It touched almost all human activity.

The power of steam, however, was not first discovered by engineers in frock coats but by Heron of Alexandria some 1700 years earlier. This learned mathematician created a sphere that spun on its axis thanks to steam shooting out of a pair of vents. Heron was a prolific inventor, and his spinning sphere, the 'aeolipile', may have been put to practical use. Largely, though, it was seen as little more than a curiosity, like his moving statues and automated puppet theatre, and steam's vast potential lay buried in the manuscripts of his work for nearly two millennia.

The wide-ranging uses of steam power mark it out as a General-Purpose Technology (GPT), along with the wheel, the factory system and the internet. Economists Richard Lipsey and Kenneth Carlaw identified a total of 24 GPTs over the course of human history. Few would dispute the claim of Mustafa Suleyman, CEO of Microsoft AI, that Artificial Intelligence is the next GPT.

In L&D, the spread of AI has been inexorable, its domination complete. Countries which were sceptical or indifferent about AI in 2023, such as Ireland and Brazil, have joined the ranks of those placing it first on their survey results. It's reasonable to think it will soon play some role in most of the other options on the survey, from Showing value to Learning experience platforms.

It is this rapid spread of interest that led Eglė Vinauskaitė and me to publish three reports on the use of AI in L&D between November 2023 and October 2024, tracking changing attitudes to – and expectations of – AI. The pattern over those 12 months was clear: L&D is now using AI more than ever, but largely still for creating training materials. Only a handful are using it as a point solution for tackling particular business problems and fewer still are putting AI at the heart of organisation-wide transformation.

In the last of those three reports, AI in L&D: Intention and Reality, we explored the conditions that have helped L&D use AI for more than content creation. We found no natural progression that leads from using AI for content production to using it to solve business problems. Rather, using AI in a more sophisticated way requires readiness across three areas: readiness in AI, in L&D and in the business.

L&D readiness for AI means much more than knowing how to use generative AI. It means running an entirely different L&D department – one open to change and understanding the business. That, in turn, means having relationships within the organisation to understand performance issues and tackle them. I hope that the rebound of voting for the 'value trio' is an indication that L&D now sees this link between AI and the ability to demonstrate value.

Comfortably situated on the southern shores of the Mediterranean, Alexandria was, by the time of Heron, no longer at its peak. For centuries, it had been a rich city with a vibrant culture, home to great thinkers and visionaries. It could have become the birthplace of a revolution based on steam power. Instead, Heron's aeolipile was seen as an amusing novelty, and from the 3rd century, Alexandria began to decline. It never regained its position as a centre of Western scholarship.

The Alexandrians chose to ignore the potential of new technology, and now we in L&D must also choose. Will we treat AI as a novelty, good for some tasks, but a sideshow next to our core activity of hand-crafting courses? That is the easy path. It leads to the backwater of irrelevance. Rather, we must build: build readiness within our departments, build strong relationships with the rest of the business and above all, build an understanding of the fuel of AI: organisational data. We cannot say exactly where this will lead us, but we can be sure of one thing: building for a future founded on data and AI will increase L&D's impact and influence. It won't be easy, but it is a choice we must make: the choice of a future of influence or irrelevance.

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 6 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 many countries, for example, the survey is mostly promoted by a single company. It remains a possibility that this will skew the results.

Definitions

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

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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Netex is dedicated to the application of new technologies into the world of learning. We offer a complete ecosystem of cloud-based learning solutions for all the needs of our clients, whether corporations, publishers or educational institutions. Our learning solution capabilities are built around our SaaS Next-Generation Learning Platform – learningCloud - whilst our products and services include content solutions, focusing on catalogue content, content development services and an authoring tool.

HowNow is the AI-powered learning and skills platform that maps skills needs to contextualised learning in the flow of work. The innovative technology helps organisations create and develop the right skills, at the right time, bridging the gap between L&D and measurable business impact. One of the fastest-growing learning experience platforms in Europe, HowNow is loved by thousands of learners, with brands including Trainline, TomTom, HotelPlan, and the UK Government.

Colossyan transforms text into interactive videos, eliminating the need for cameras and complex production. Businesses utilize our AI video generator to create engaging training, onboarding, and communication experiences. With features like quizzes, branching, and multilingual support, Colossyan delivers personalized and scalable learning that drives deeper engagement and better results.

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Sweden: Swedish Learning Association

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Türkiye: Enocta

UAE/GCC: Biz Group

UK: The Talent and Leadership Club

Worldwide: Global Skill Development Council

Further reading

We're committed to producing research that helps L&D professionals understand what is happening in our field and, where possible, provides tools to help them flourish.

Our reports and surveys are founded on the fundamental principle of being descriptive rather than prescriptive. That is, we aim to describe what is happening in L&D in a way that helps practitioners do their work better, rather than suggest to them what they should be doing, based on a theoretical understanding of their work.

Focus on AI in L&D:
Intention and Reality

Published: October 2024

The third report in 12 months focusing on AI in L&D, this report includes a further set of case studies and introduces the Immaturity Model. By Donald H Taylor and Eglė Vinauskaitė.

AI in L&D:
Intention and reality
By **Donald H Taylor** and **Eglė Vinauskaitė**
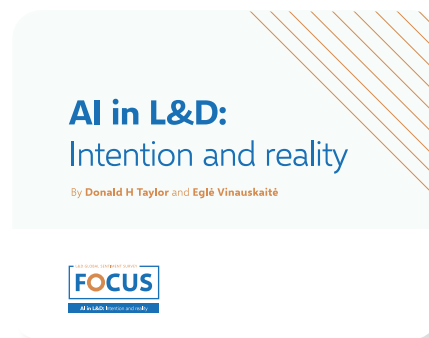
FOCUS

Focus on AI in L&D:
From Talk to Action

Published: April 2024

This report explores how organizations are now moving beyond theoretical discussions of AI in L&D and taking tangible steps to implement these technologies in their strategies. By Donald H Taylor and Eglė Vinauskaitė.

AI in L&D:
From Talk to Action
By **Donald H Taylor** and **Eglė Vinauskaitė**
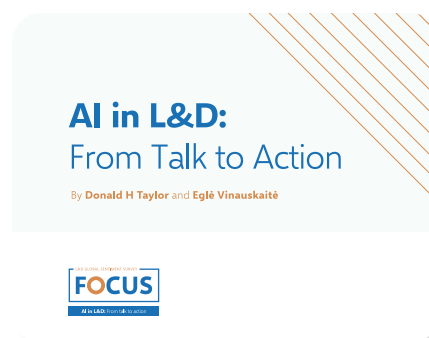
FOCUS

The Global Sentiment Survey 2024

Published: February 2024

This survey captured the global outlook in L&D, focusing on the challenges and opportunities of 2024. It also identified the increasing role of AI and digital transformation in shaping the industry. By Donald H Taylor

LEARNING AND DEVELOPMENT
Global Sentiment Survey 2024

Focus on AI in L&D:
The State of Play

Published: November 2023

Published on the anniversary of the launch of ChatGPT, this report explored the progress L&D had made in those twelve months. in using AI. By Donald H Taylor and Eglė Vinauskaitė.

AI in L&D:
The State of Play
By **Donald H Taylor** and **Eglė Vinauskaitė**

FOCUS

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.

Find him on **LinkedIn** and at **www.donaldhtaylor.co.uk.**

LEARNING AND DEVELOPMENT

Global
Sentiment
Survey 2025

Donald Taylor is based in London, UK, and helps organisations understand emerging trends in the field of Learning and Development. He is particularly focused on helping L&D departments make the transition to a new way of working suitable for the twenty-first century.

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