Global Sentiment Survey

Top trends in L&D for 2019

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Global Sentiment Survey

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Today

2
Shifting to
data-driven L&D

4
A world of difference

1
Results for 2019
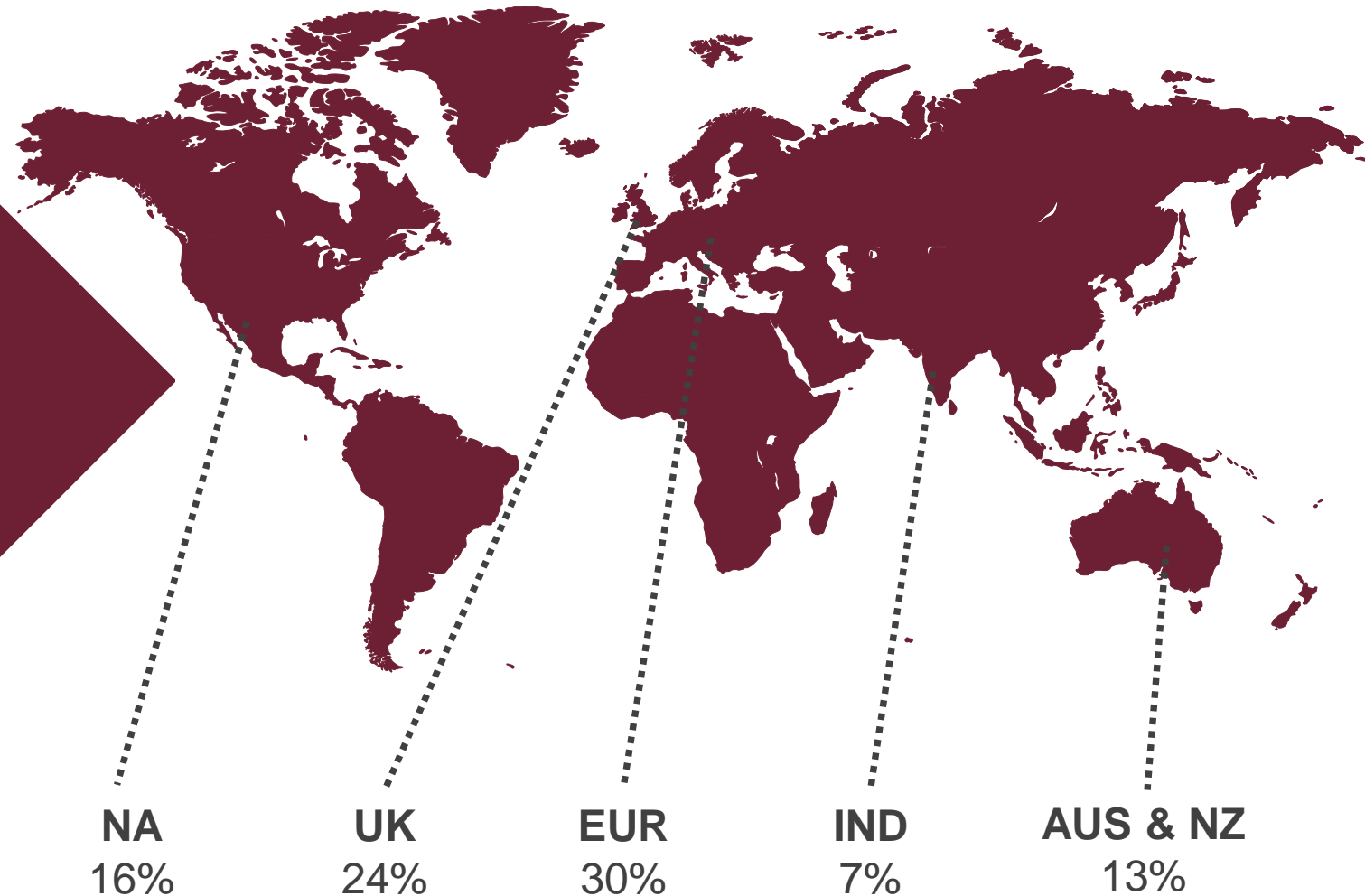
3
Exploring the results

5
A different future

1

Results for 2019

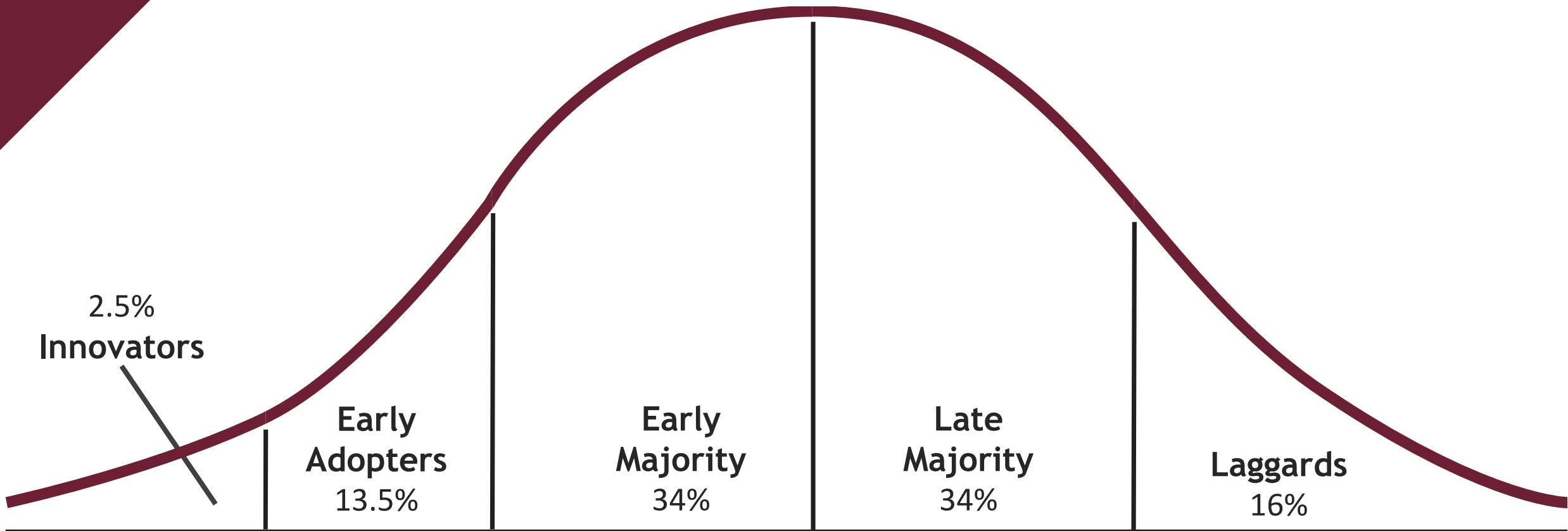"What will be hot in workplace L&D in 2019?"

◆ Year 6
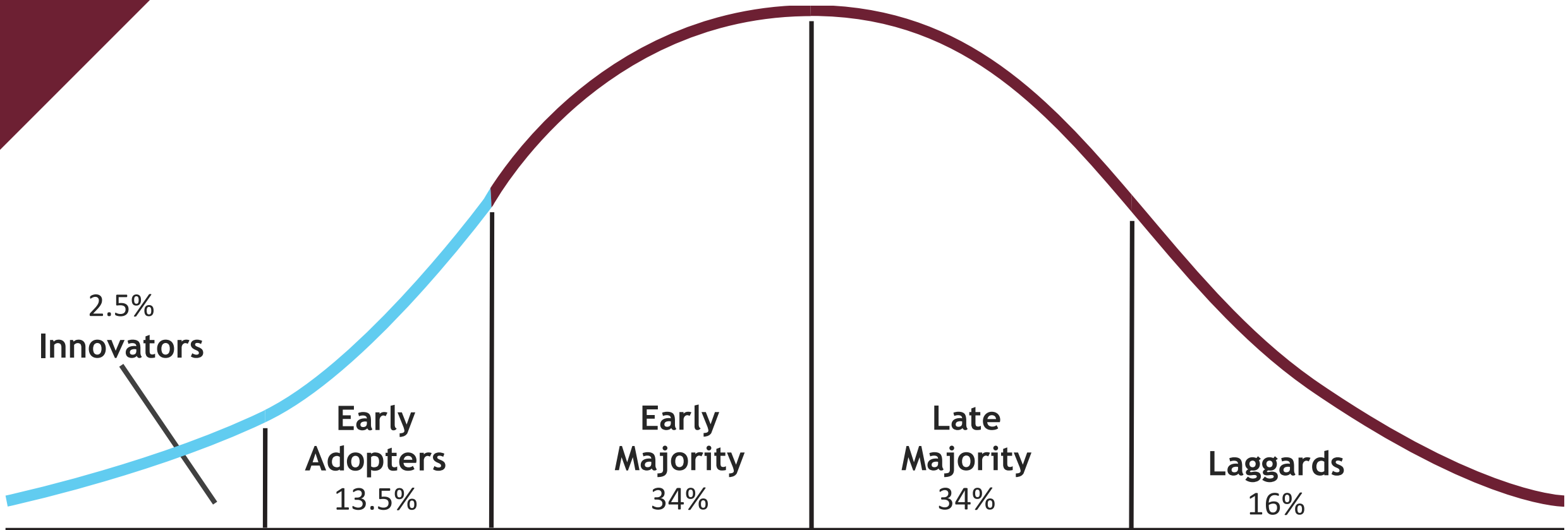◆ Choose 1-3 options from 15
◆ 1,953 voters, 5,332 votes
◆ 92 countries

NA
16%

UK
24%

EUR
30%

IND
7%

AUS & NZ
13%

Caveats — The people: Predictive, not representative

2.5%
Innovators

Early Adopters
13.5%

Early Majority
34%

Late Majority
34%

Laggards
16%

Caveats The people: Predictive, not representative

2.5%
Innovators

Early Adopters 13.5%

Early Majority 34%

Late Majority 34%

Laggards 16%

Voting over the 58 days
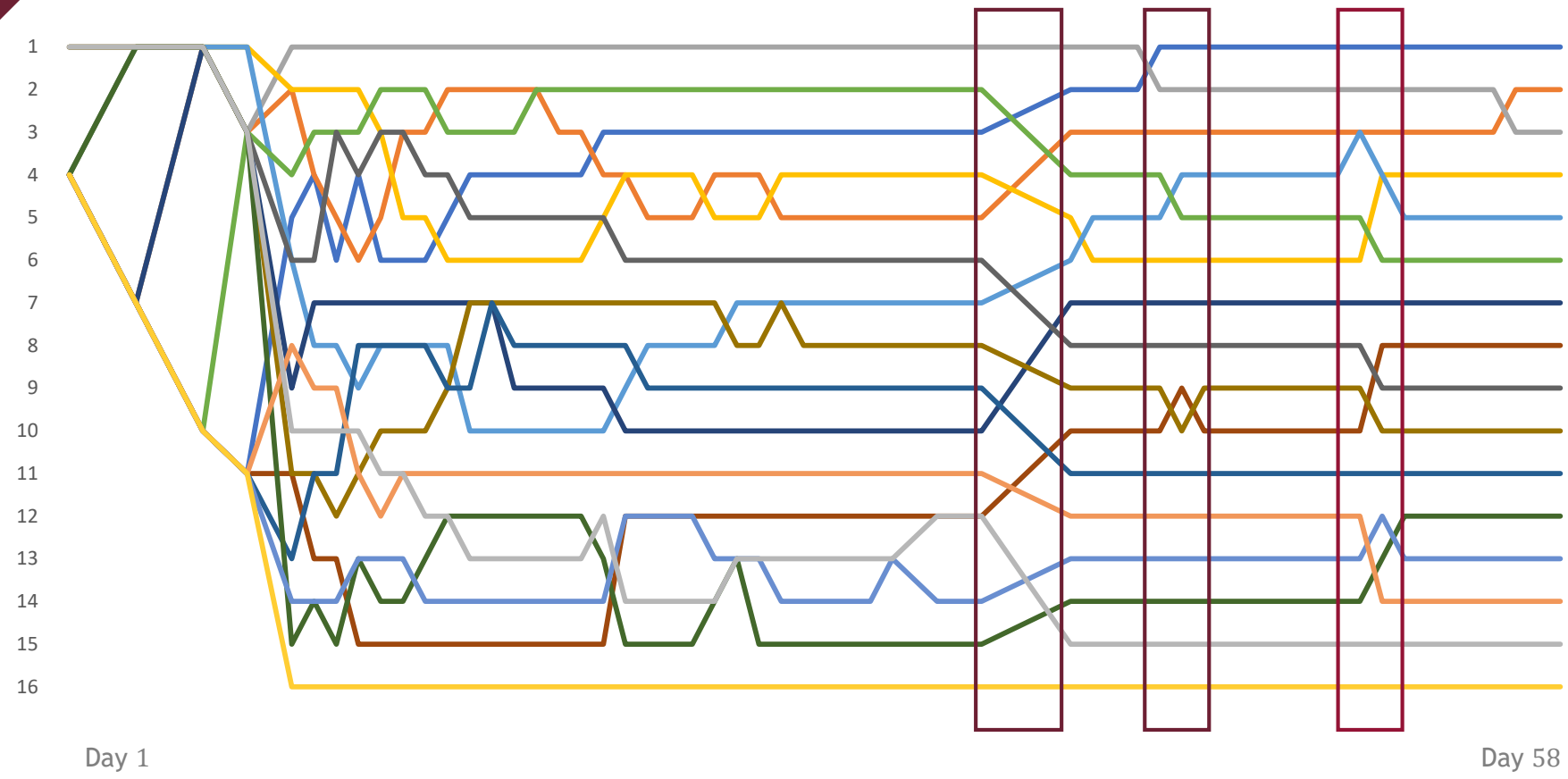
1
2
3
4
5
6
7
8
9
10
11
12
13
14
15
16

Personalization/adaptive delivery
Artificial intelligence
Learning analytics
Collaborative/social learning
Micro learning
Learning experience platforms
Virtual and augmented reality
Mobile delivery
Consulting more deeply with the business
Showing value
Performance support
Neuroscience/cognitive science
Video
Curation
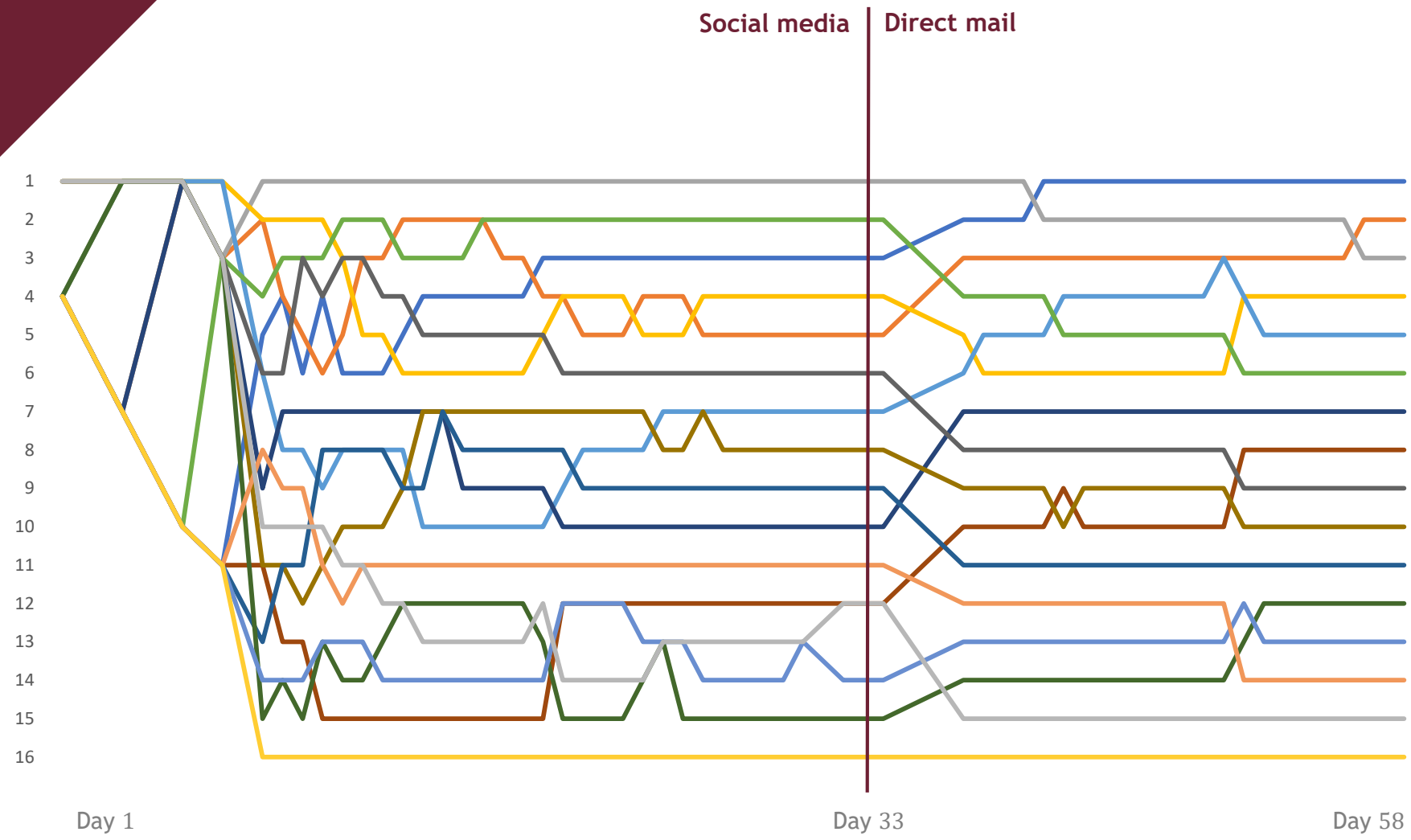Developing the L&D function
Other:

Day 1   Day 58
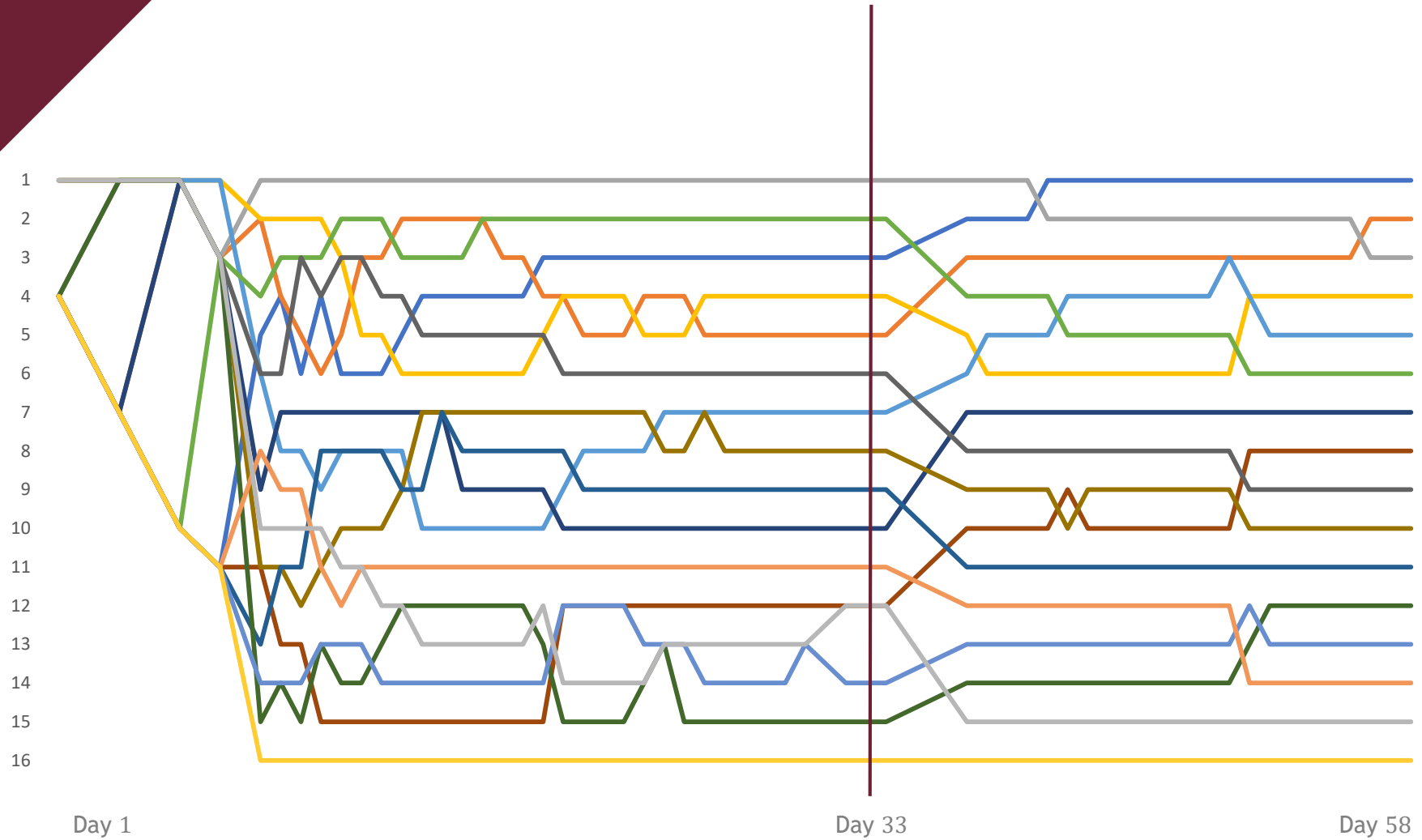
Voting over the 58 days

Day 1   Day 33   Day 58

Voting over the 58 days

Day 1

Day 58

Voting over the 58 days

Social media | Direct mail

Day 1 | Day 33 | Day 58

Voting over the 58 days

Group 1
c. 1,250 **votes**
427 **people**

Group 2
c. 4,000 **votes**
1,528 **people**

Day 1

Day 33

Day 58

Voting over the 58 days

Group 1
c. 1,250 votes
427 people

Group 2
c. 4,000 votes
1,528 people

From 1 to 3

From 12 to 8

Day 1

Day 33

Day 58
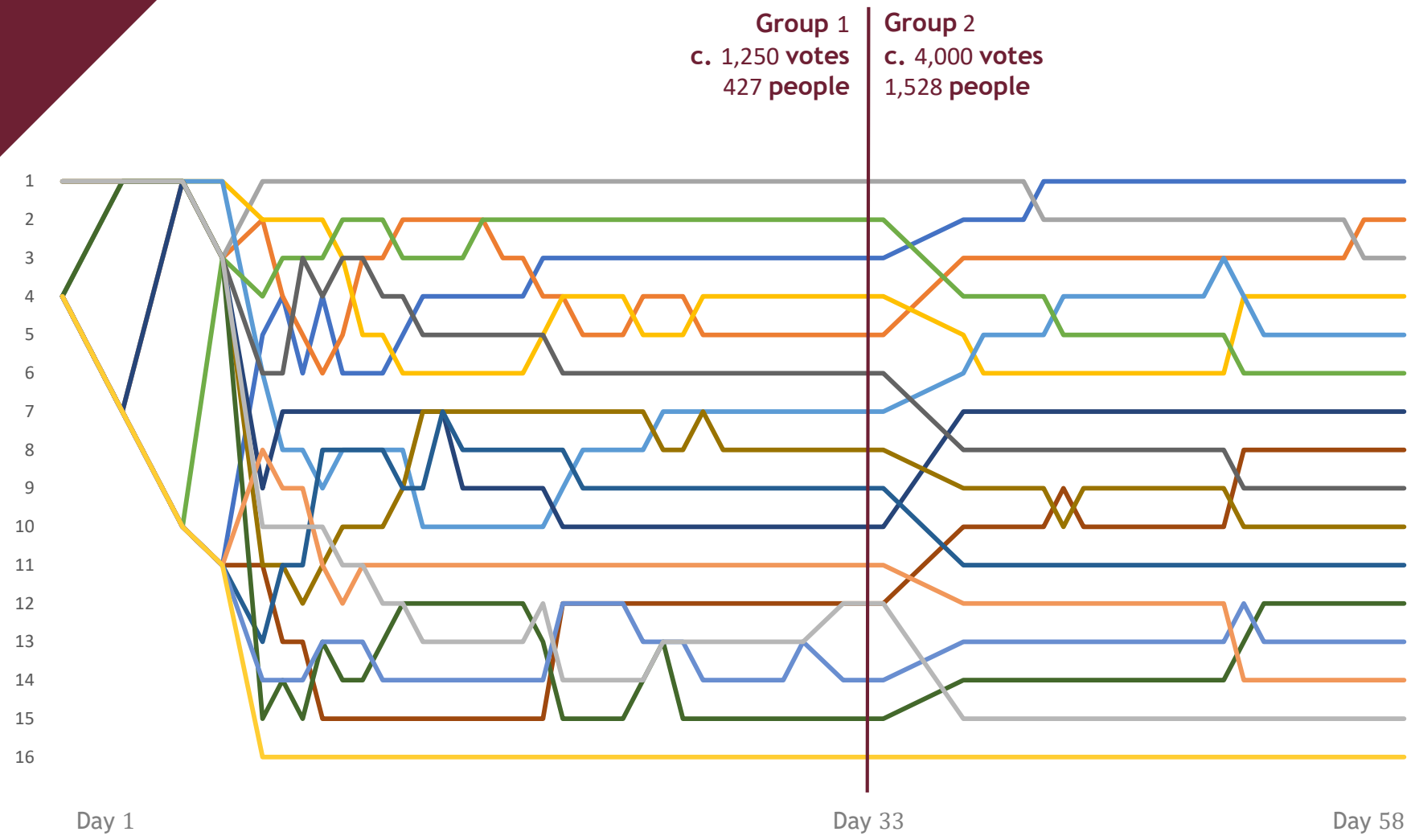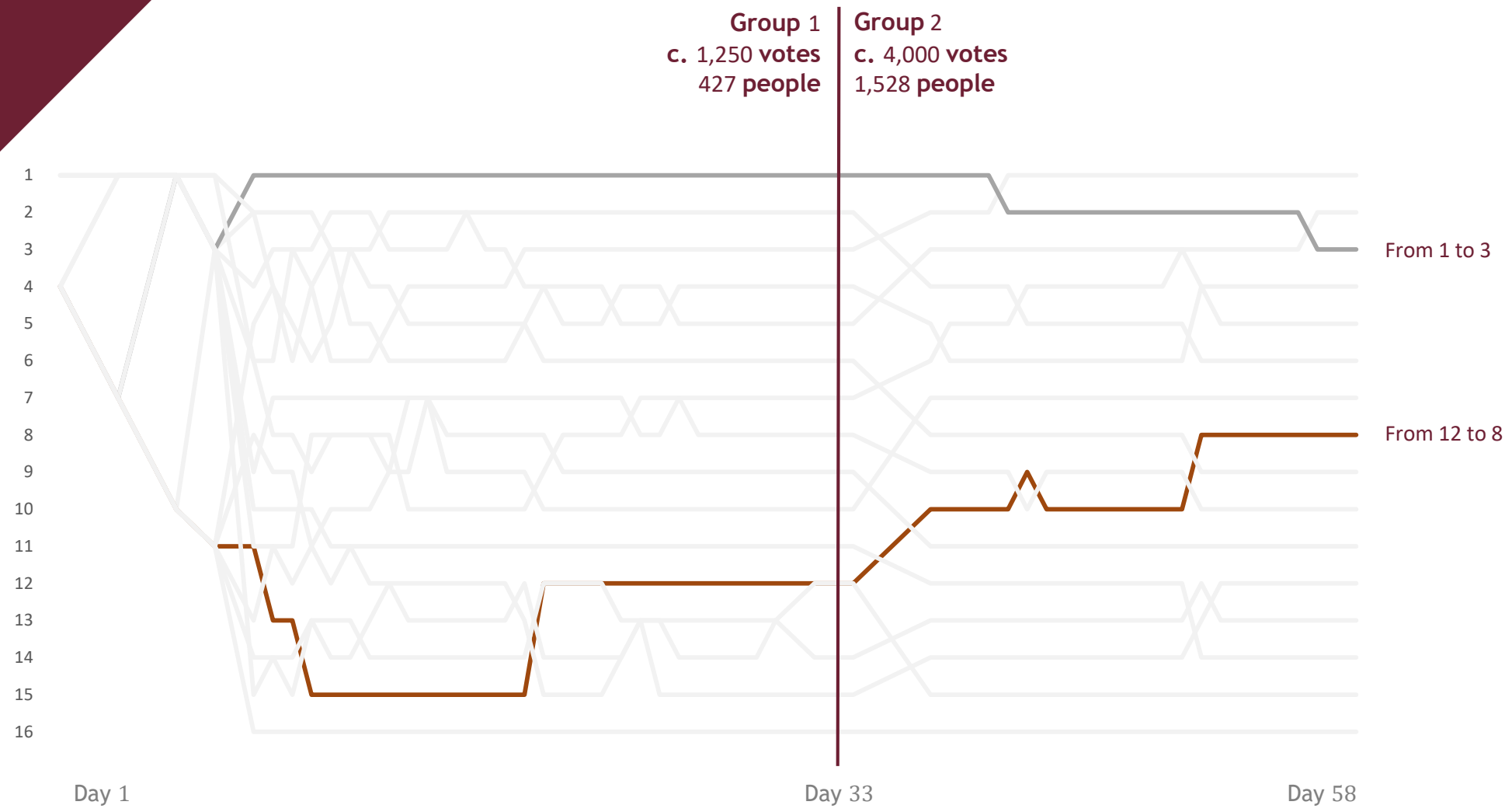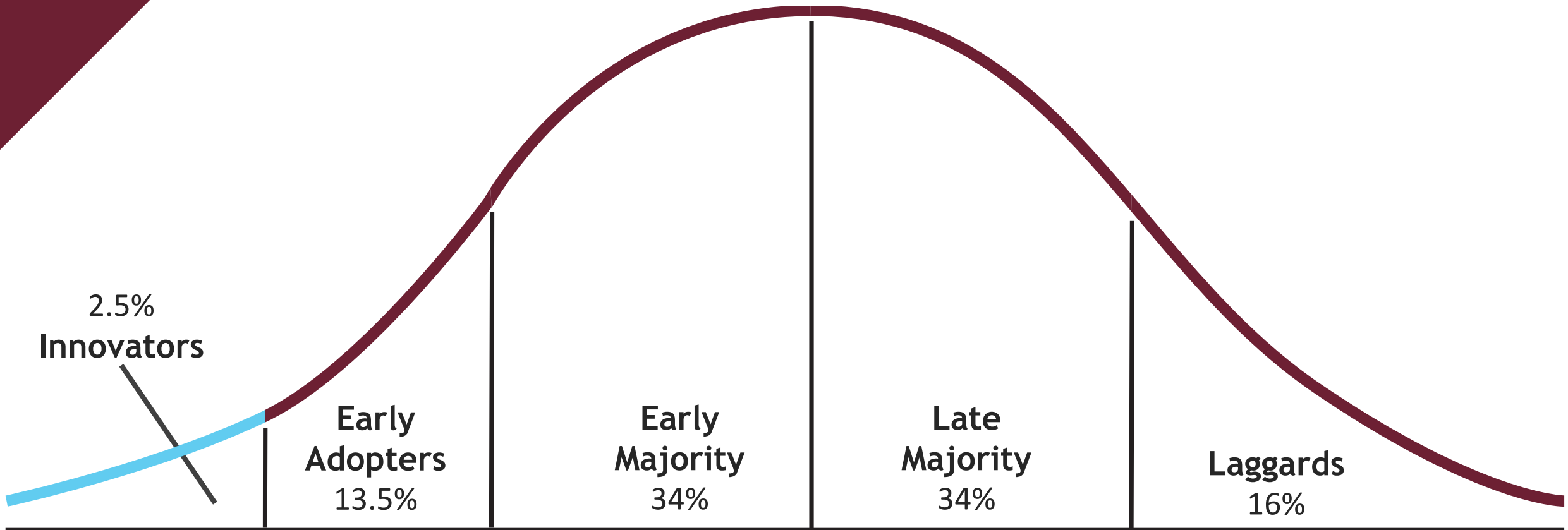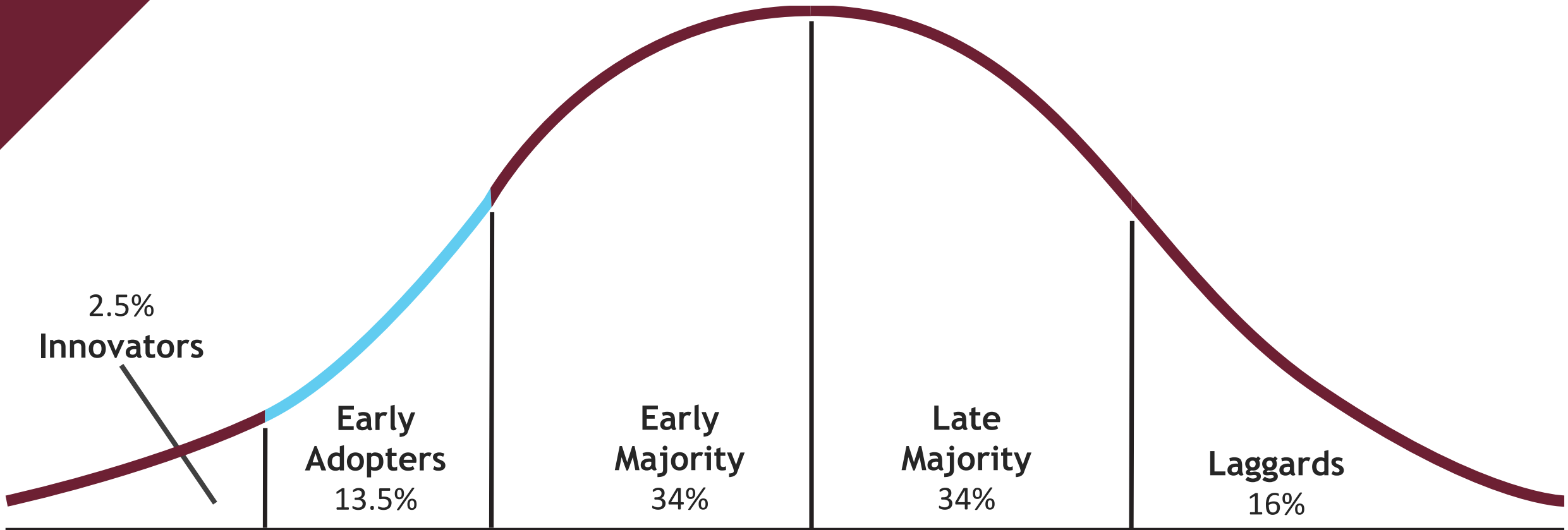
Caveats

The people: Predictive, not representative

The question: Sentiment, not intent

The analysis: Where >100 people

Question

What do you think will be hot in workplace L&D in 2019?

What do you think will be hot in workplace L&D in 2019?

Artificial intelligence	Mobile delivery
Collaborative/social learning	Neuroscience/cognitive science
Consulting more deeply with the business	Performance support ◆
Curation	Personalization/adaptive delivery
Developing the L&D function	Showing value
Learning analytics ◆	Video
Learning experience platforms ◆	Virtual and augmented reality
Micro learning	Other

◆ *New in 2019*

Results for 2019

2019 ◆

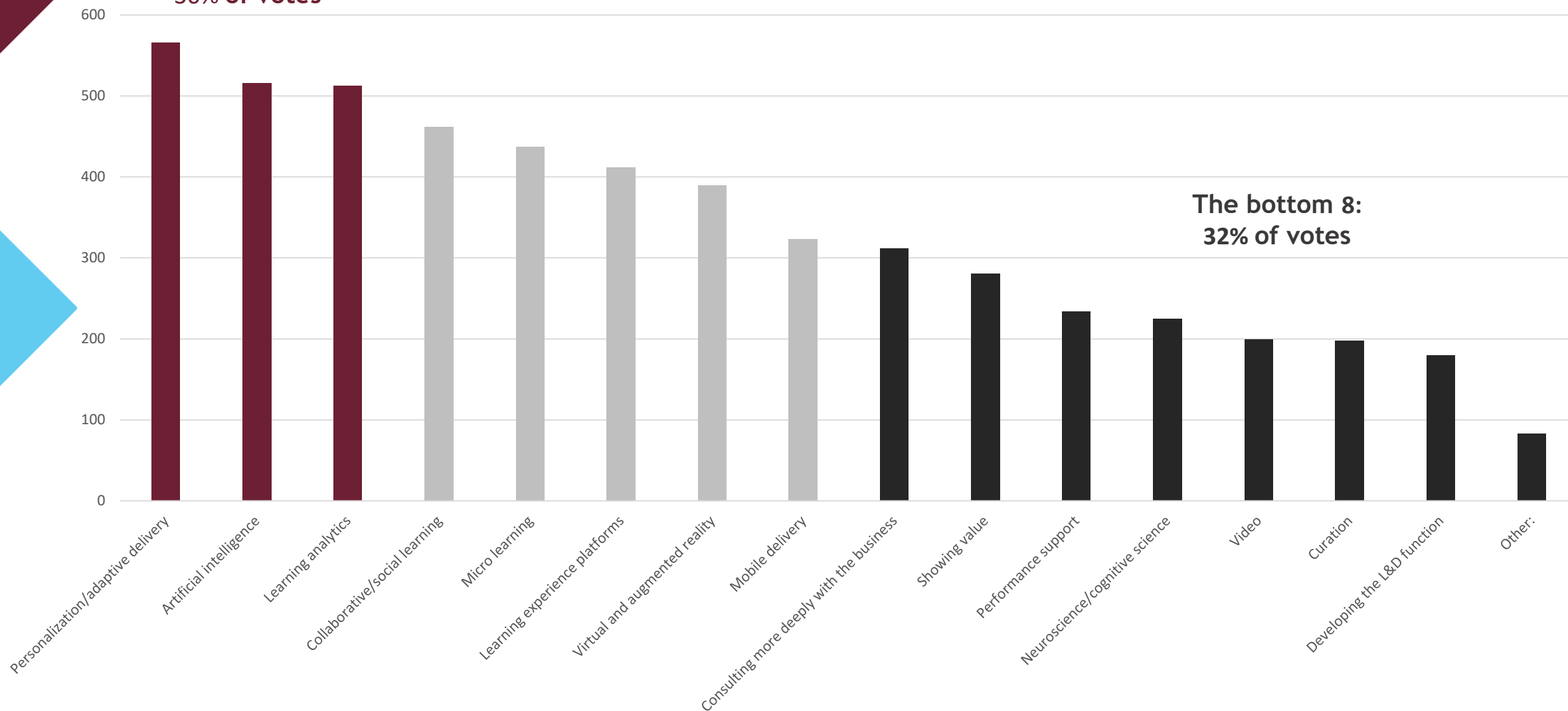|		
1.	Personalization/adaptive delivery (1)	◆
2.	Artificial Intelligence (3)	▲
3.	Learning analytics (-)	◇
4.	Collaborative/social learning (2)	▼
5.	Micro learning (5)	◆
6.	Learning experience platforms (-)	◇
7.	Virtual and augmented reality (7)	◆
8.	Mobile delivery (10)	▲
9.	Consulting more deeply with the business (4)	▼
10.	Showing value (6)	▼
11.	Performance support (-)	◇
12.	Neuroscience/cognitive science (11)	▼
13.	Video (13)	◆
14.	Curation (9)	▼
15.	Developing the L&D function (12)	▼
16.	Other: (15)	▼

68%

32%

Votes 2019   5,332

▼ *Declining*

▲ *Rising*

◆ *Unmoving*

◇ *New in 2019*

2019: Votes for all options

The top 3:
30% of votes

The bottom 8:
32% of votes

	Votes
Personalization/adaptive delivery	~565
Artificial intelligence	~515
Learning analytics	~510
Collaborative/social learning	~460
Micro learning	~435
Learning experience platforms	~410
Virtual and augmented reality	~390
Mobile delivery	~325
Consulting more deeply with the business	~310
Showing value	~280
Performance support	~235
Neuroscience/cognitive science	~225
Video	~200
Curation	~197
Developing the L&D function	~180
Other:	~83

Results 2019: 3 key take aways

2019 ◆	
1.	Personalization/adaptive delivery (1)
2.	Artificial Intelligence (3)
3.	Learning analytics (-)
4.	Collaborative/social learning (2)
5.	Micro learning (5)
6.	Learning experience platforms (-)
7.	Virtual and augmented reality (7)
8.	Mobile delivery (10)
9.	Consulting more deeply with the business (4)
10.	Showing value (6)
11.	Performance support (-)
12.	Neuroscience/cognitive science (11)
13.	Video (13)
14.	Curation (9)
15.	Developing the L&D function (12)
16.	Other: (15)

Votes 2019	5,332

1 **This year, it's all about data**

Results 2019: 3 key take aways
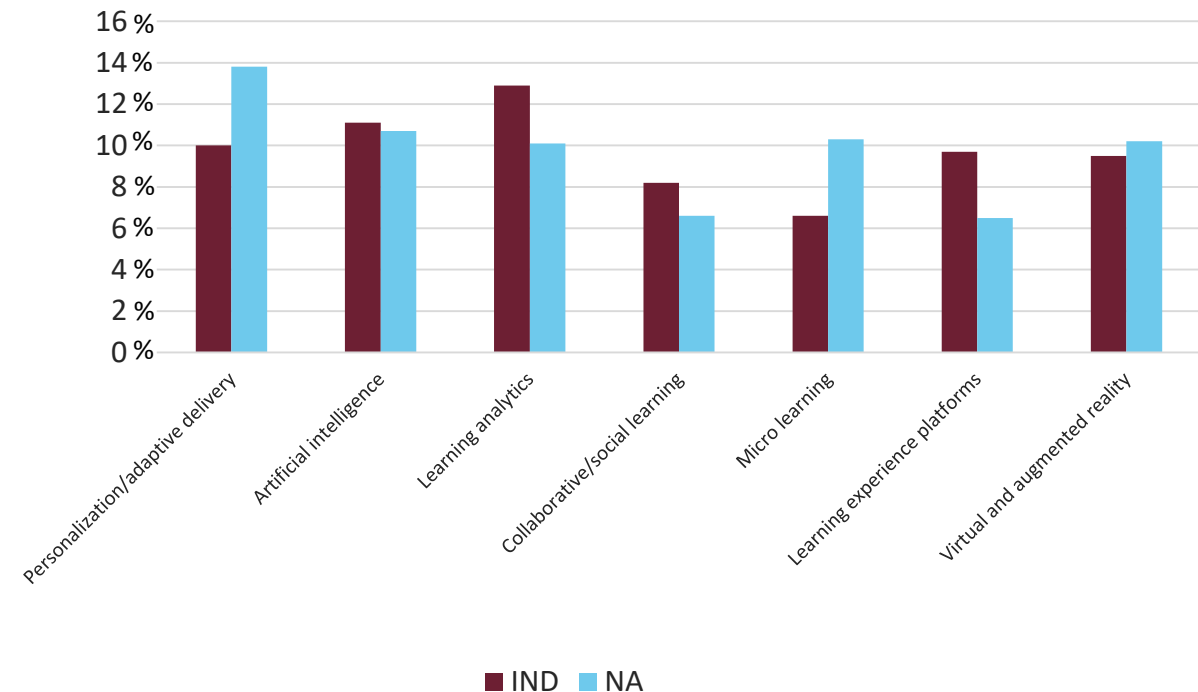
2019 ◆

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11.	Performance support (-)
12.	Neuroscience/cognitive science (11)
13.	Video (13)
14.	Curation (9)
15.	Developing the L&D function (12)
16.	Other: (15)

Votes 2019	5,332

1 **This year, it's all about data**

2 **Some strong regional differences**

IND   NA

Results 2019: 3 key take aways

2019 ◈

1.	Personalization/adaptive delivery (1)	
2.	Artificial Intelligence (3)	
3.	Learning analytics (-)	
4.	Collaborative/social learning (2)	
5.	Micro learning (5)	◇
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7.	Virtual and augmented reality (7)	◇
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12.	Neuroscience/cognitive science (11)	
13.	Video (13)	
14.	Curation (9)	
15.	Developing the L&D function (12)	
16.	Other: (15)	

Votes 2019   5,332

1 This year, it's all about data

2 Some strong regional differences

3 Dramatic declines and startling come-backs

▼ *Declining*

▲ *Rising*

◆ *Unmoving*

◇ *New in 2019*

Results 2019: 3 key take aways

2019 ◆

1.	Personalization/adaptive delivery (1)
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10.	Showing value (6) ▼
11.	Performance support (-)
12.	Neuroscience/cognitive science (11)
13.	Video (13)
14.	Curation (9) ▼
15.	Developing the L&D function (12) ▼
16.	Other: (15)

Votes 2019   5,332

1 This year, it's all about data

2 Some strong regional differences

3 Dramatic declines and startling come-backs

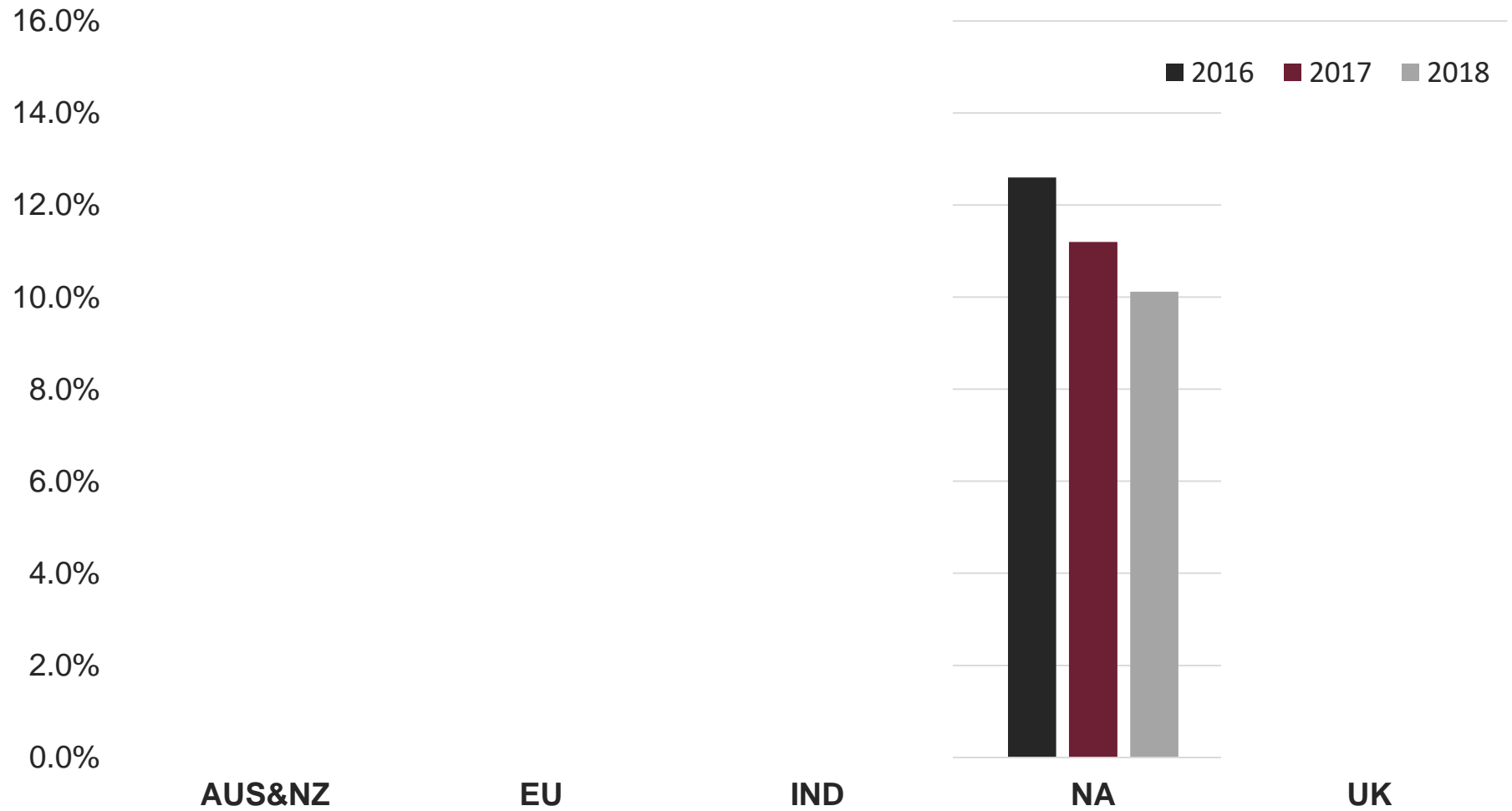▼ *Declining*

▲ *Rising*

◆ *Unmoving*

◇ *New in 2019*

2

Shifting to data-driven learning and development

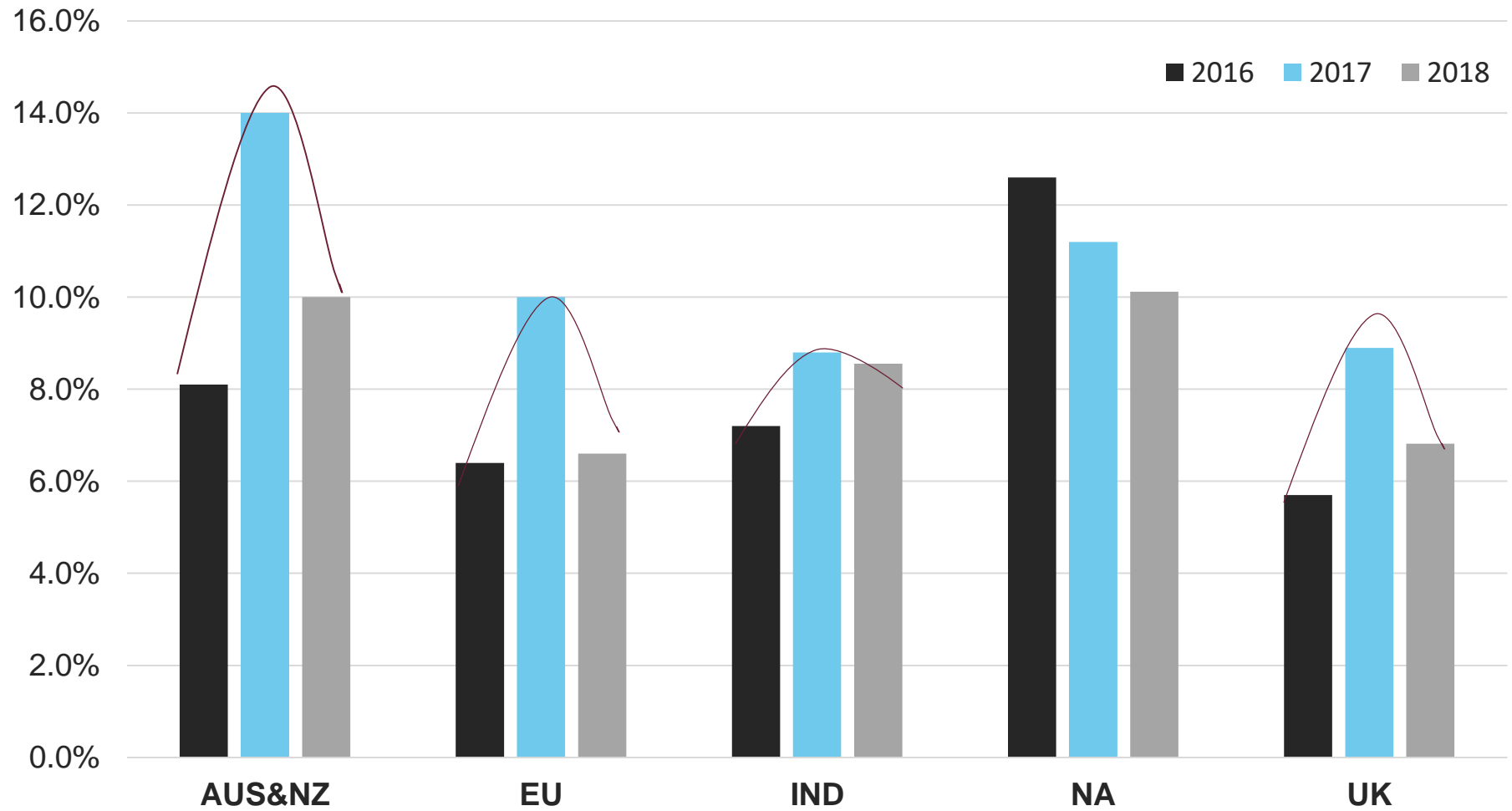# The top 3

1. Personalization/adaptive delivery
2. Artificial intelligence
3. Learning analytics

Interest in micro learning across regions 2016 - 2018

Legend: ■ 2016 ■ 2017 ■ 2018

Region	2016	2017	2018
AUS&NZ			
EU			
IND			
NA	12.6%	11.3%	10.1%
UK			

Interest in micro learning across regions 2016 - 2018

Artificial intelligence: share of regional vote over time

3
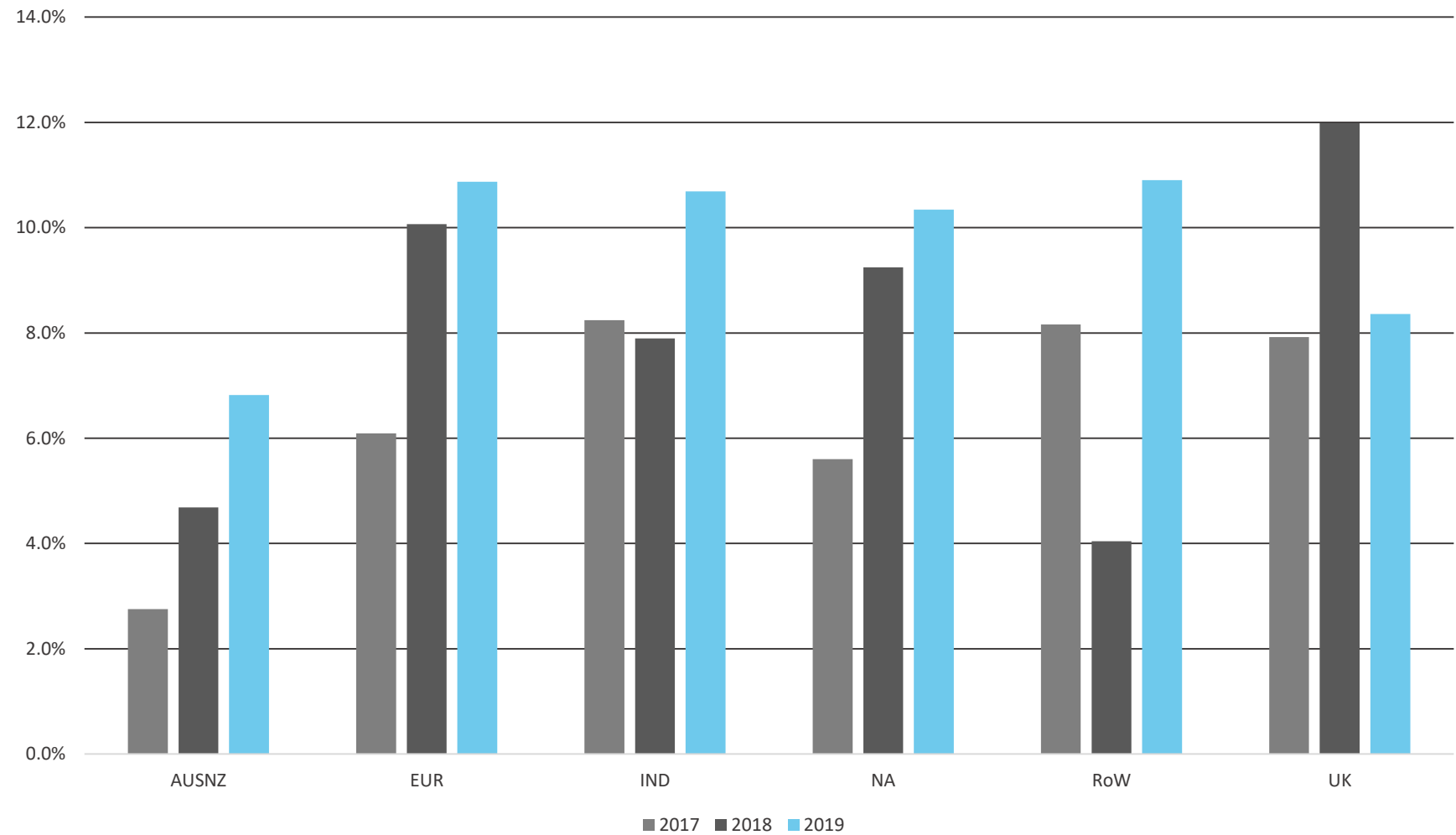
Exploring the results

Exploring the results

1
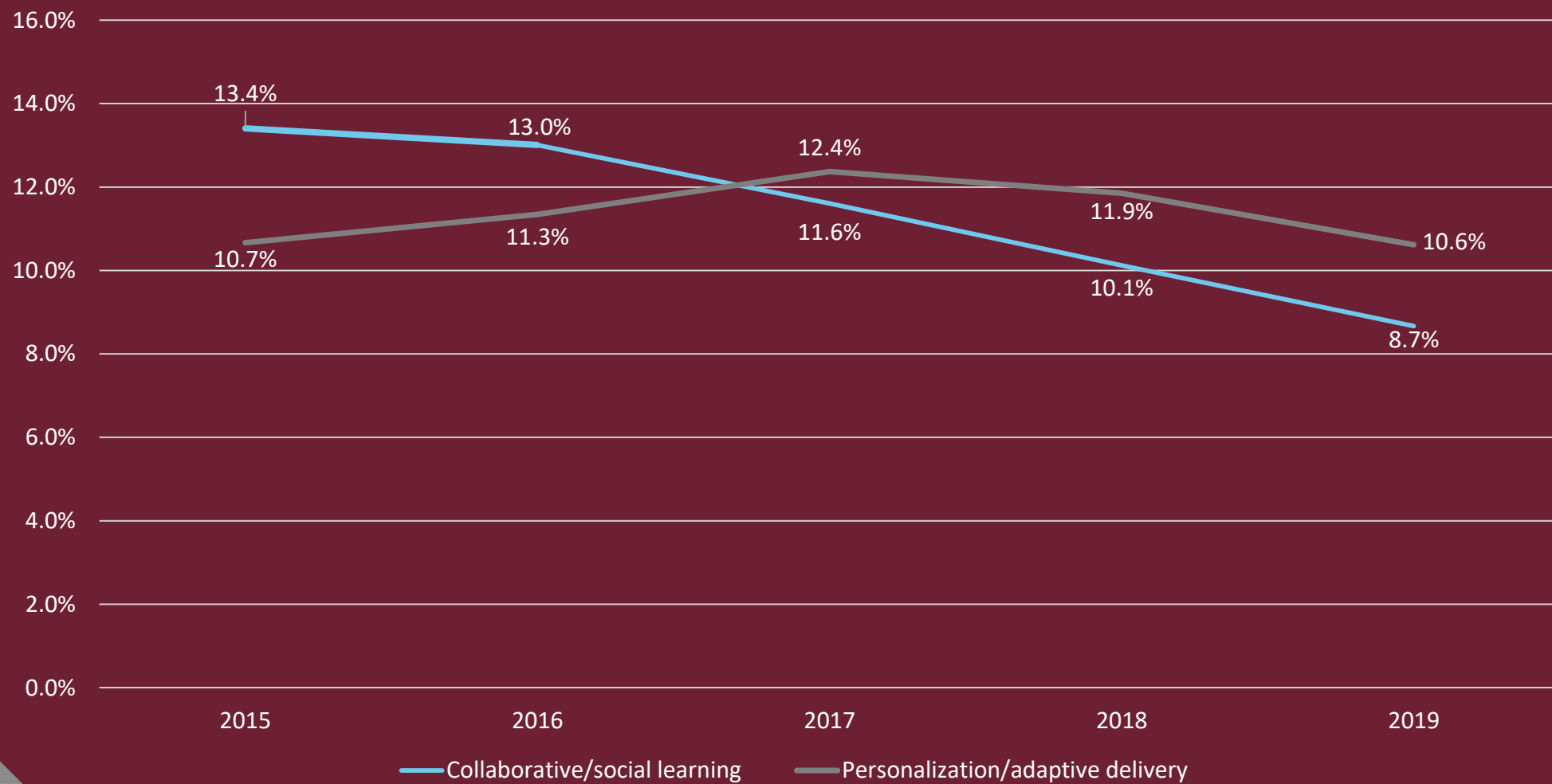
Personalisation and collaboration

2

Persistent technologies

3

Falling from favour

Personalization and Collaboration over 5 years

Results 2015 – 2019

2015◆

1. Collaborative/social learning
2. Personalization
3. Mobile delivery
4. Curation
5. Games/gamification
6. Showing value
7. Developing the L&D function
8. Video
9. Open everything (badges, MOOCs...)
10. Synchronous online delivery
11. Other:
12. Neuroscience/cognitive science
13. Knowledge management
14. The cloud
15. Talent management

2016◆

1. Collaborative/social learning
2. Personalization/adaptive delivery
3. Consulting more deeply with the business
4. Mobile delivery
5. Micro learning
6. Games/gamification
7. Neuroscience/cognitive science
8. Showing value
9. Curation
10. Developing the L&D function
11. Synchronous online delivery
12. Video
13. Knowledge management
14. MOOCs
15. Wearable tech
16. Other:

2017◆

1. Personalization/adaptive delivery
2. Collaborative/social learning
3. Micro learning
4. Virtual and augmented reality
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6. Showing value
7. Mobile delivery
8. Artificial intelligence
9. Curation
10. Games/gamification
11. Neuroscience/cognitive science
12. Video
13. Developing the L&D function
14. Personal knowledge mastery (PKM)
15. Other:
16. MOOCs

2018◆

1. Personalization/adaptive delivery
2. Collaborative/social learning
3. Artificial intelligence
4. Consulting more deeply with the business
5. Micro learning
6. Showing value
7. Virtual and augmented reality
8. Next generation learning platforms
9. Curation
10. Mobile delivery
11. Neuroscience/cognitive science
12. Developing the L&D function
13. Video
14. Games/gamification
15. Other:
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2019◆

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7. Virtual and augmented reality
8. Mobile delivery
9. Consulting more deeply with the business
10. Showing value
11. Performance support
12. Neuroscience/cognitive science
13. Video
14. Curation
15. Developing the L&D function
16. Other:

| Votes 2015 | 619 | Votes 2016 | 1,922 | Votes 2017 | 2,361 | Votes 2018 | 2,894 | Votes 2019 | 5,332 |

Results 2015 – 2019: Persistent technologies

2015◆

1. Collaborative/social learning
2. Personalization
3. Mobile delivery
4. Curation
5. Games/gamification
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8. Next generation learning platforms
9. Curation
10. Mobile delivery
11. Neuroscience/cognitive science
12. Developing the L&D function
13. Video
14. Games/gamification
15. Other:
16. MOOCs

Votes 2015	619
Votes 2016	1,922
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Results 2015 – 2019: Persistent technologies

2015◆

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2019◆

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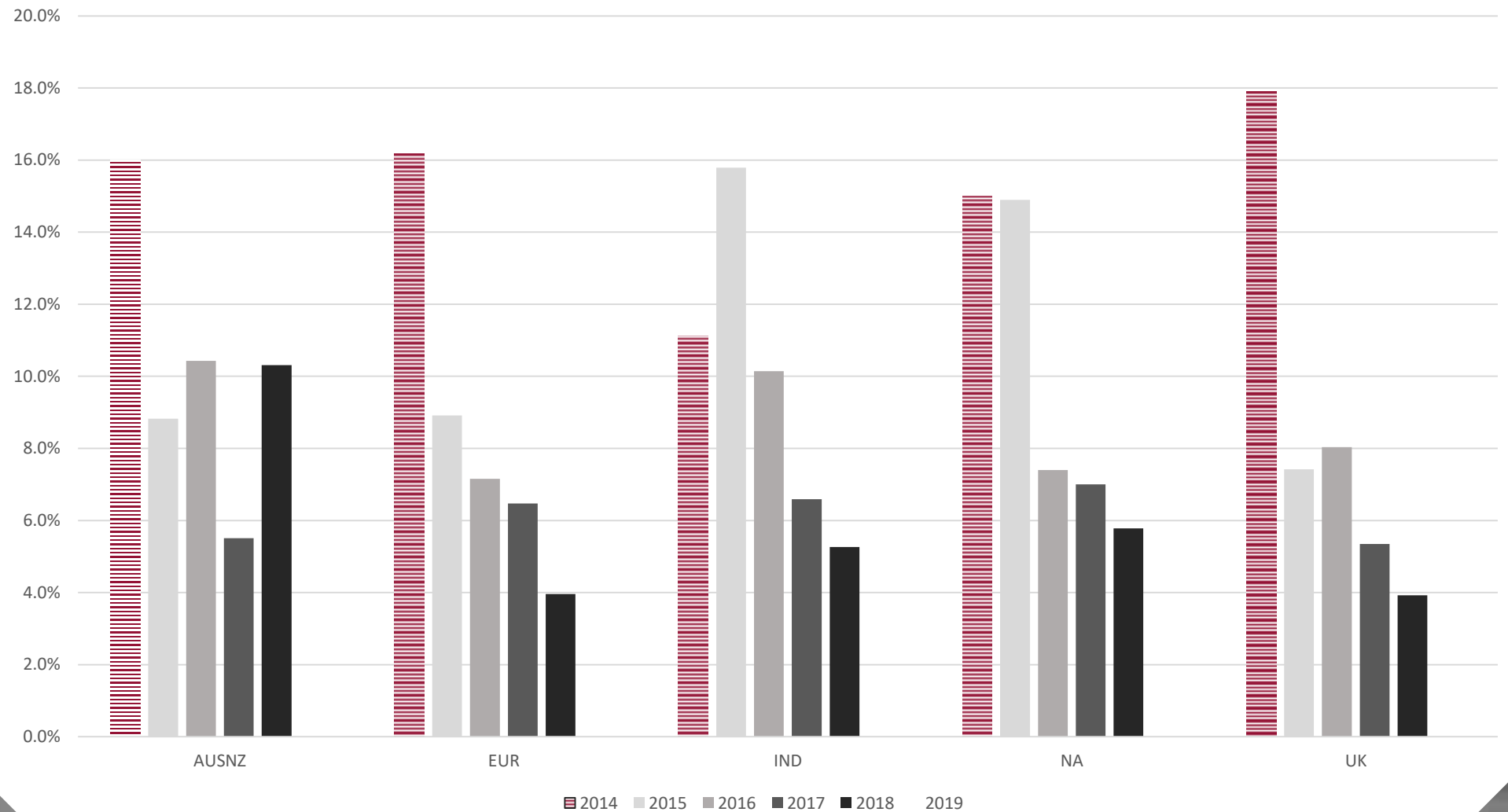16. Other:

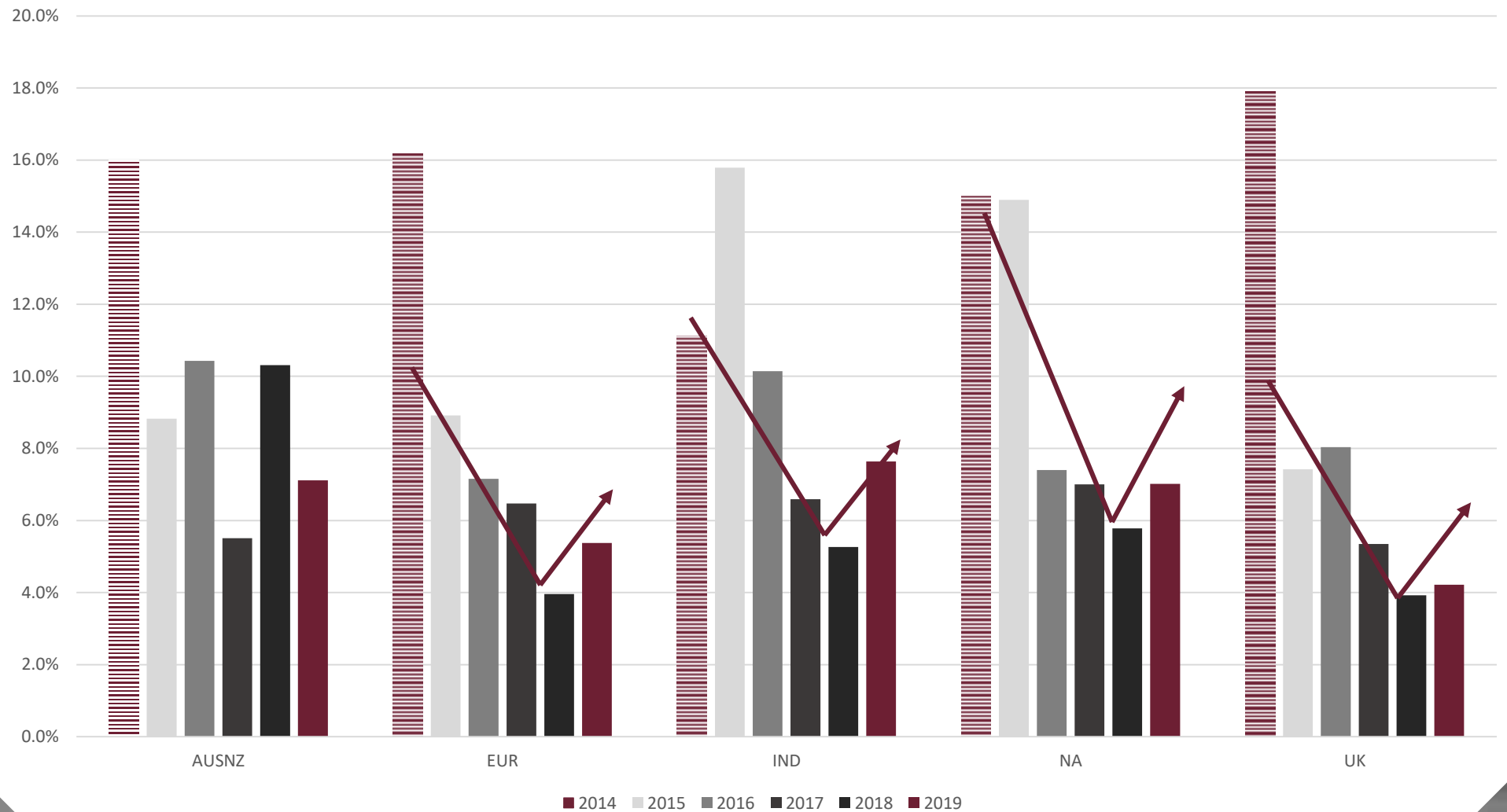| Votes 2015 | 619 | Votes 2016 | 1,922 | Votes 2017 | 2,361 | Votes 2018 | 2,894 | Votes 2019 | 5,332 |

Mobile delivery: share of regional vote over time

Legend: ▦ 2014 · 2015 · 2016 · 2017 · 2018 · 2019

X-axis categories: AUSNZ, EUR, IND, NA, UK

Y-axis: 0.0%, 2.0%, 4.0%, 6.0%, 8.0%, 10.0%, 12.0%, 14.0%, 16.0%, 18.0%, 20.0%
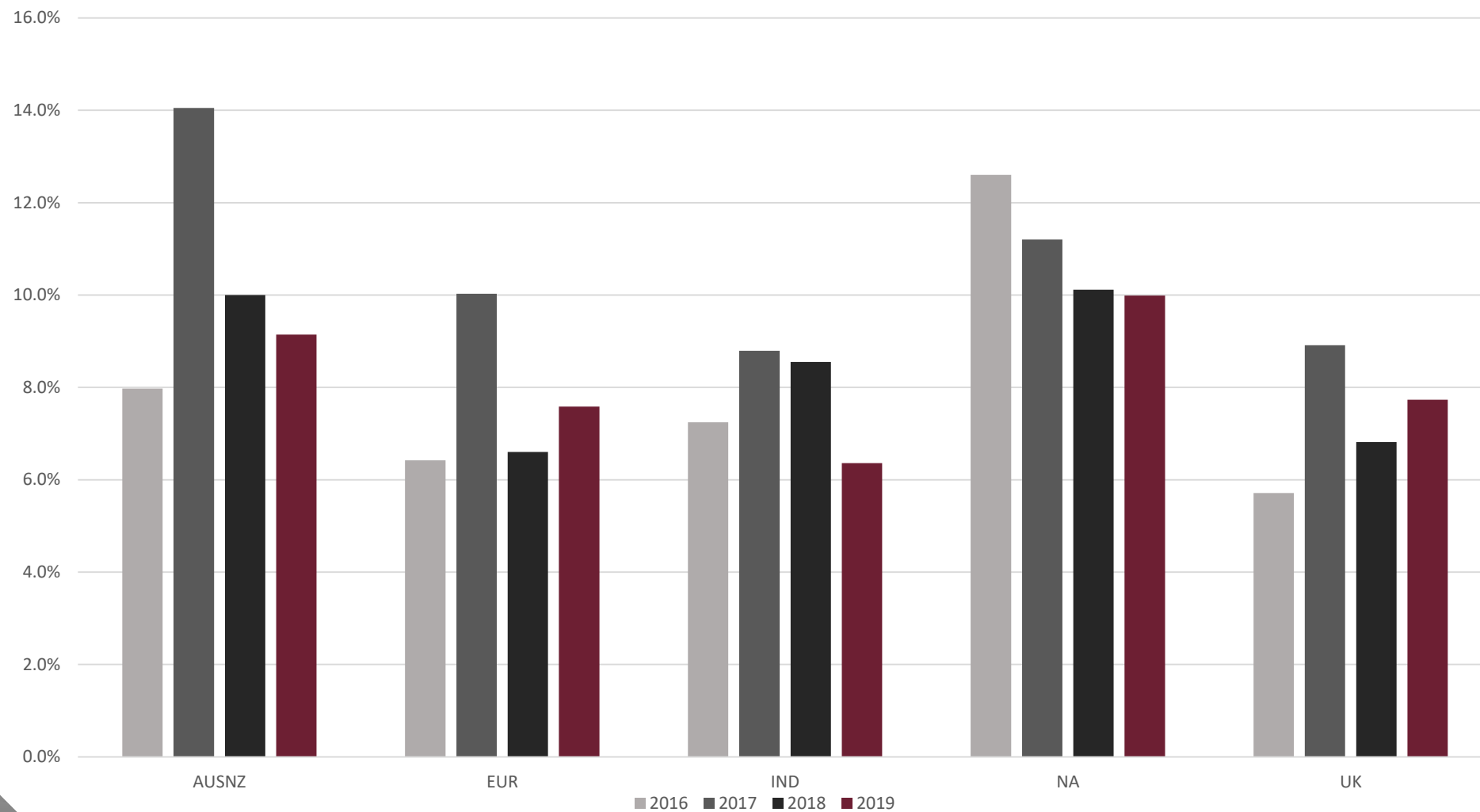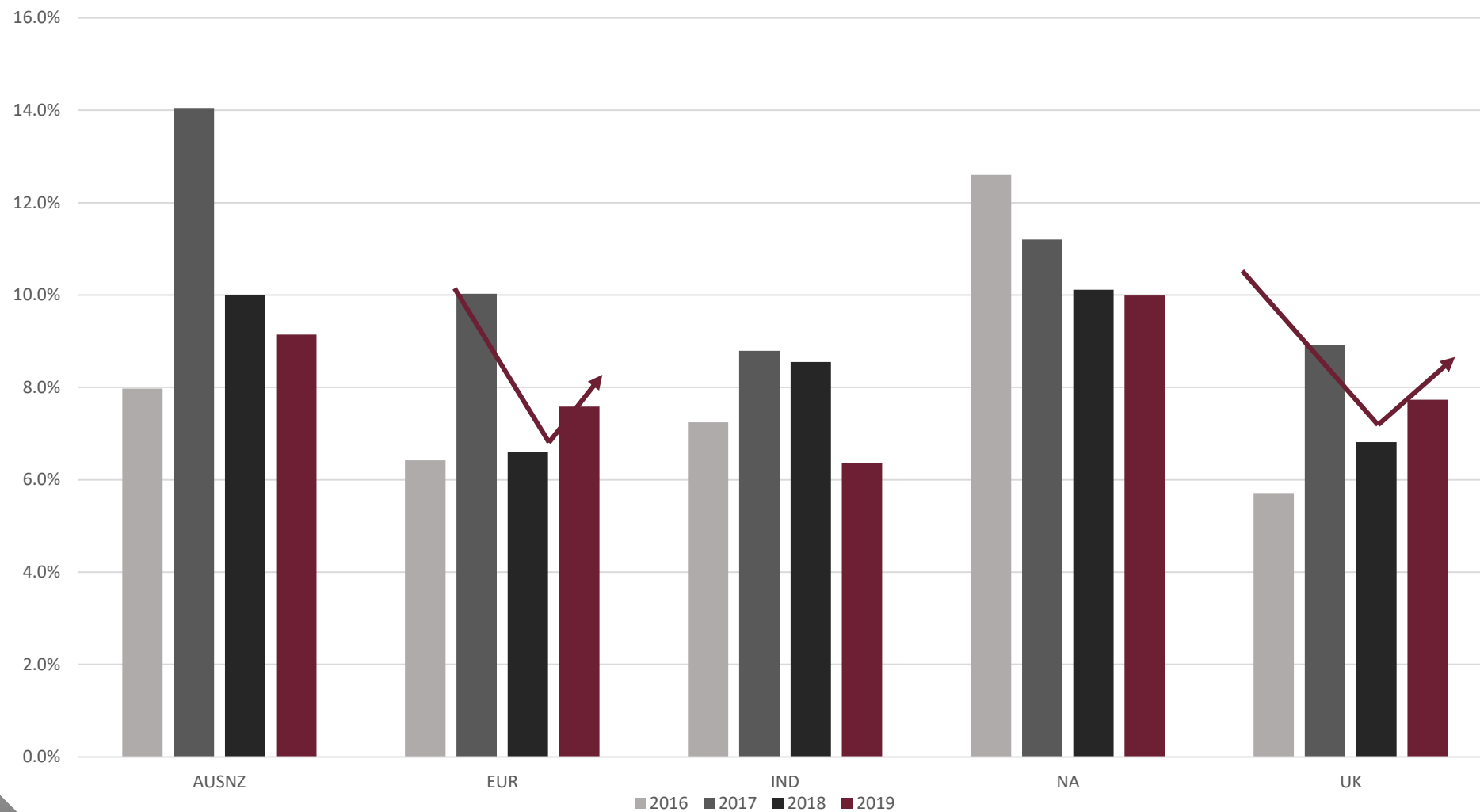
Mobile delivery: share of regional vote over time

Micro learning: share of regional vote over time
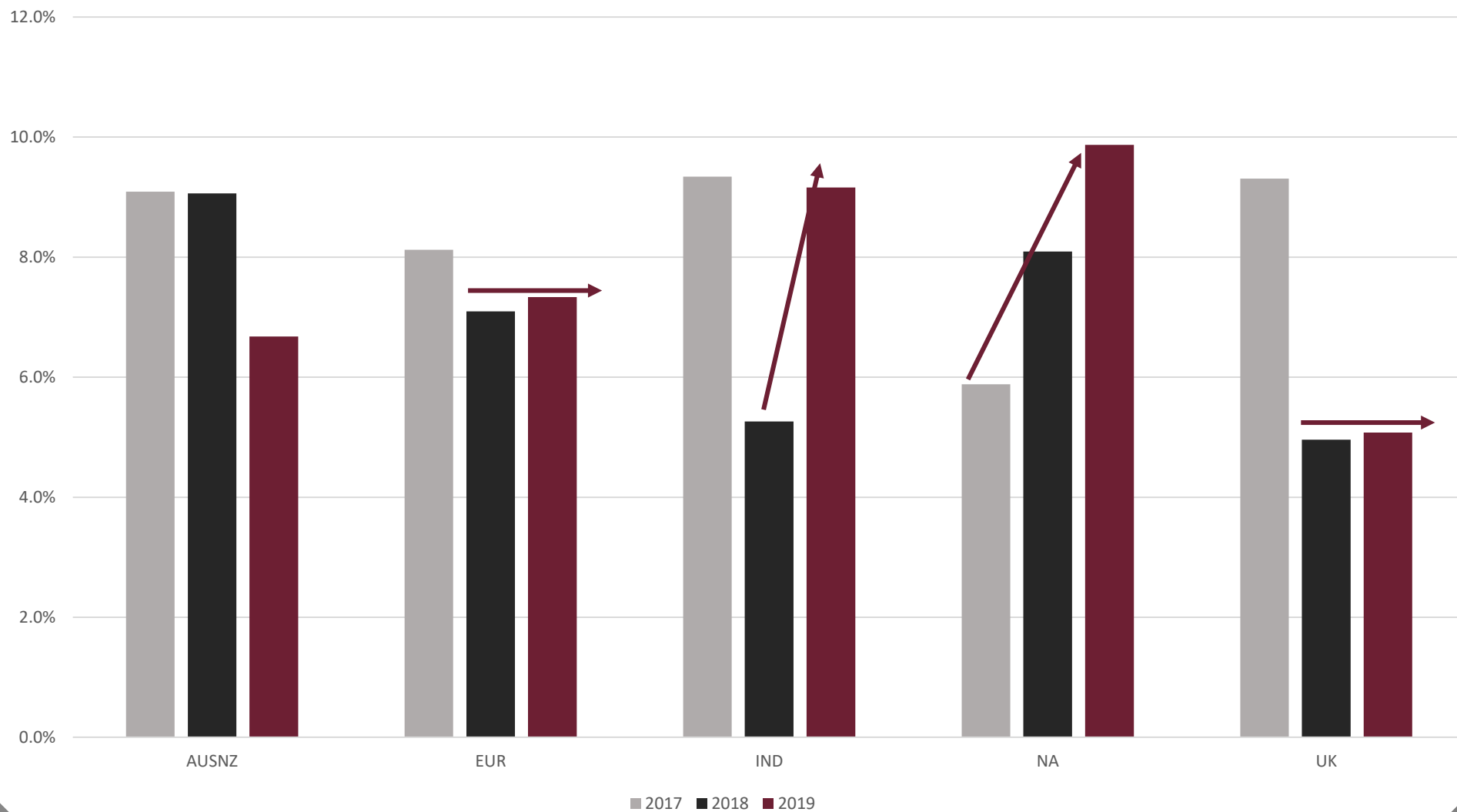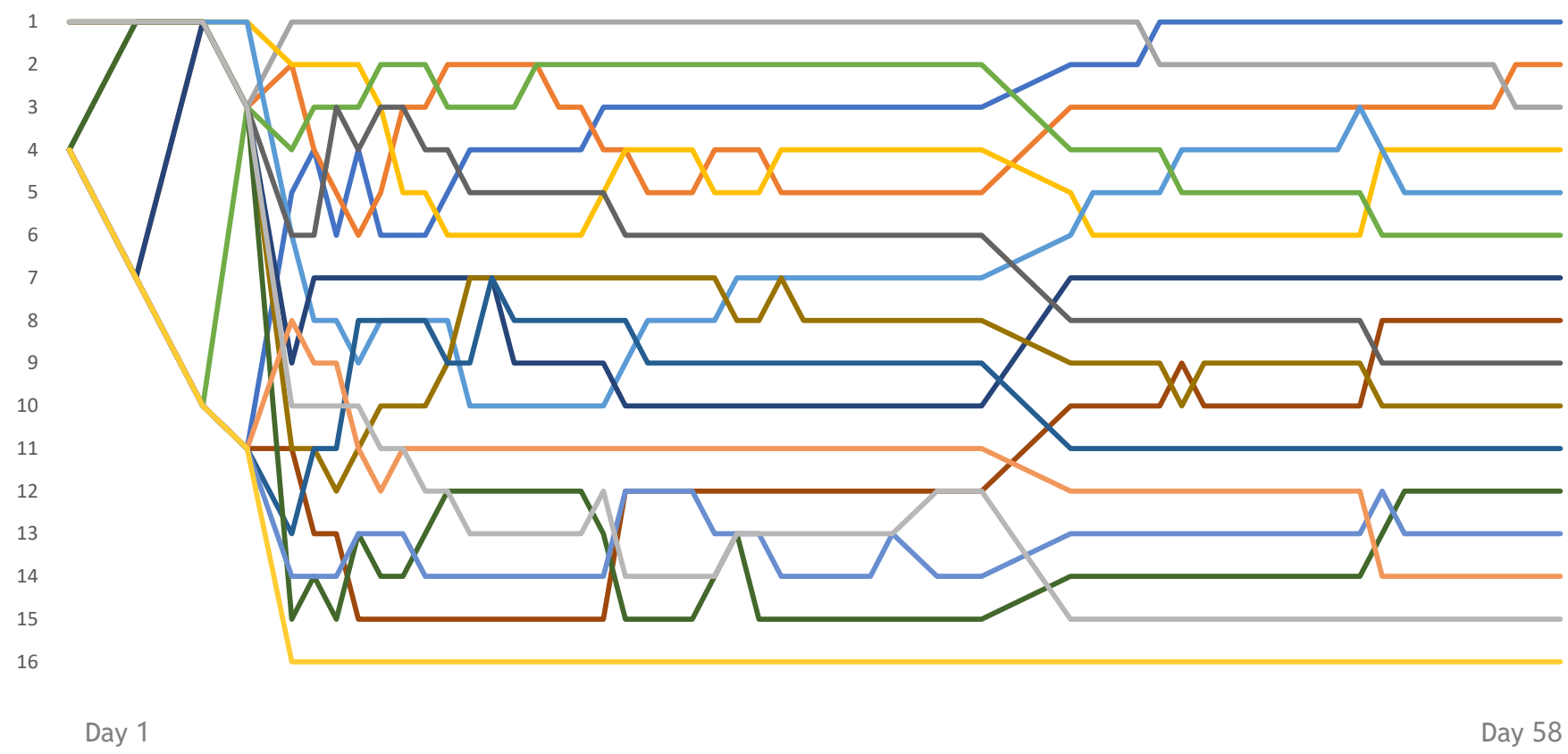
Micro learning: share of regional vote over time

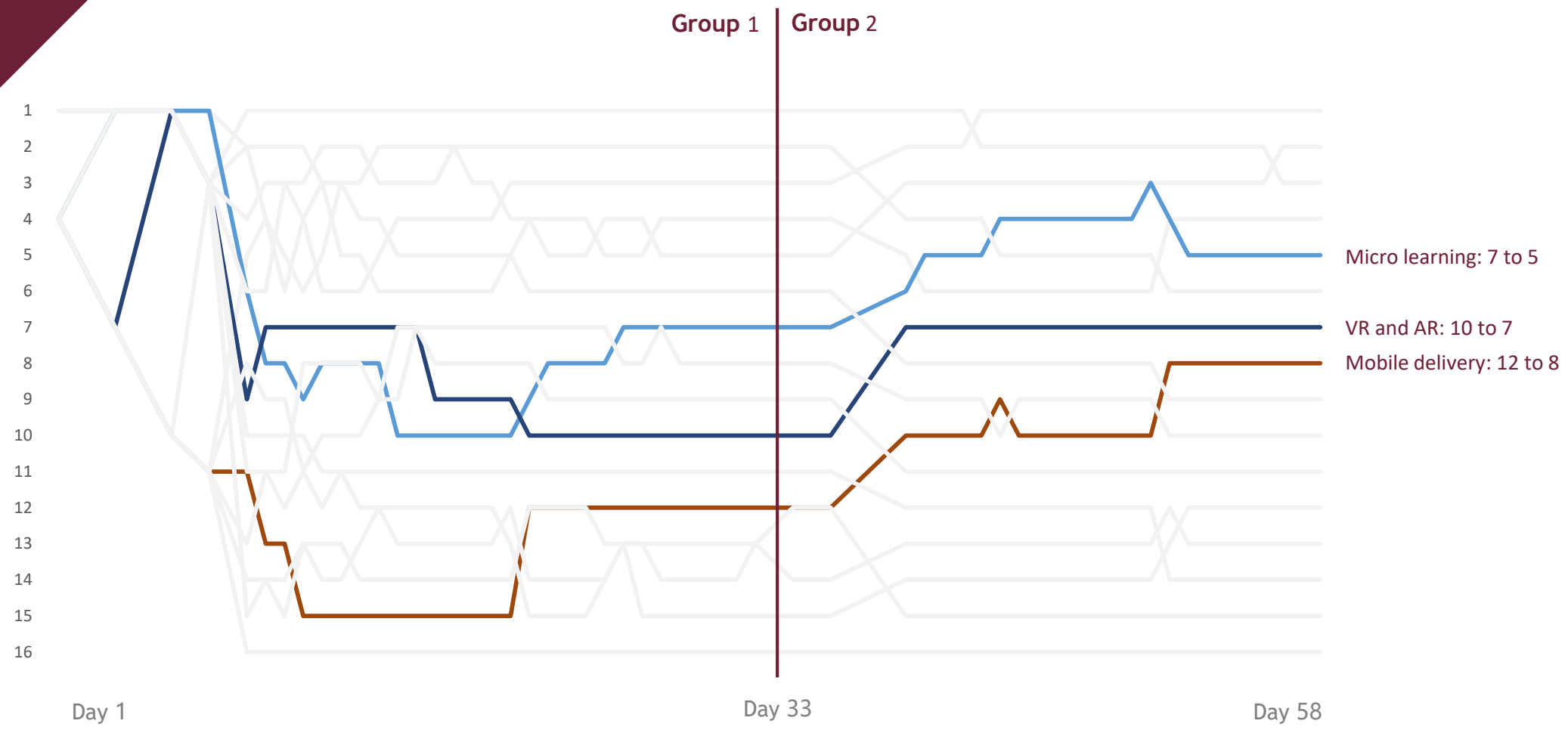Virtual and augmented reality: share of regional vote over time

Two groups

Day 1

Day 58

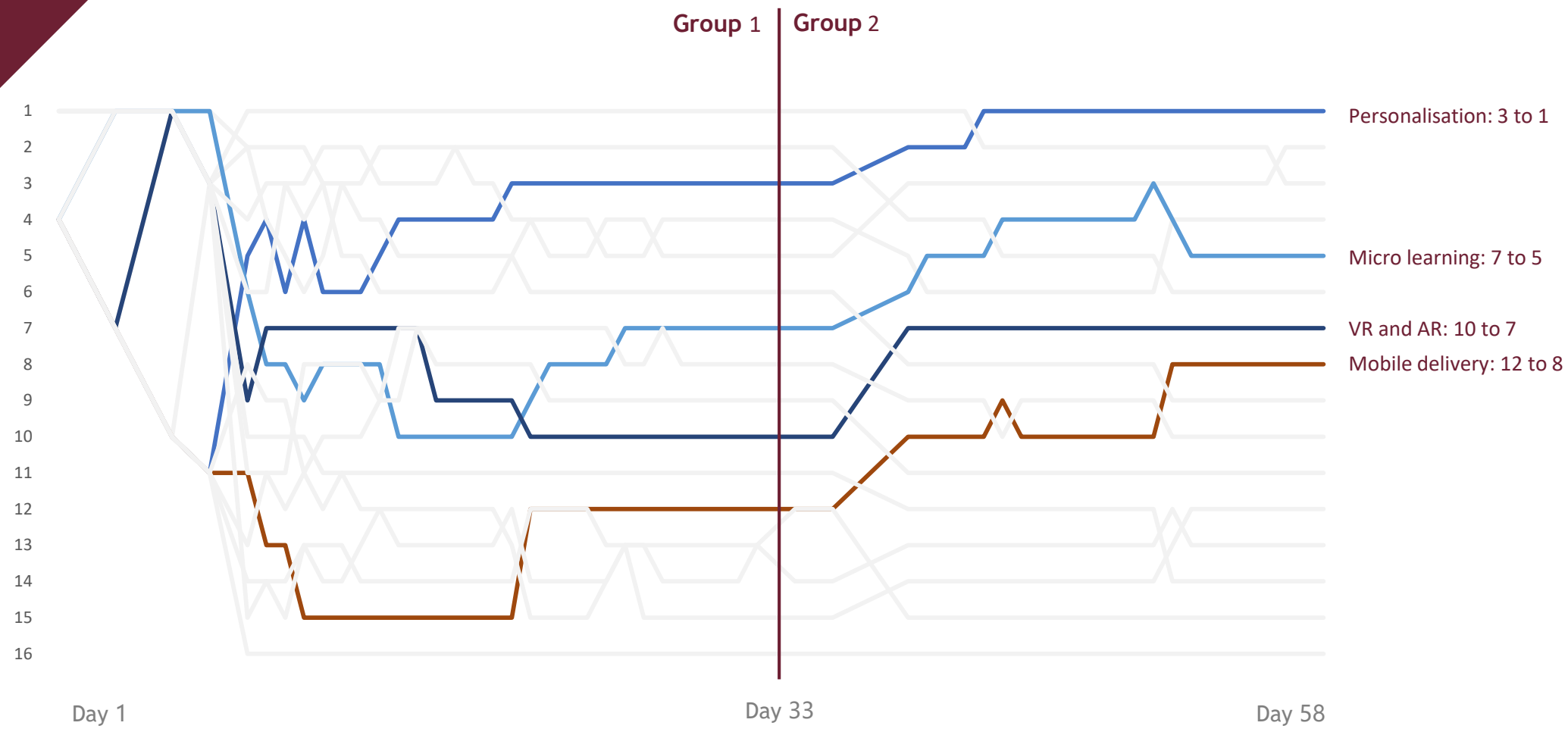Two groups

Group 1 | Group 2

Micro learning: 7 to 5
VR and AR: 10 to 7
Mobile delivery: 12 to 8

Day 1   Day 33   Day 58

Results 2015 – 2019: Falling from favour

2015◆	
1.	Collaborative/social learning
2.	Personalization
3.	Mobile delivery
4.	Curation
5.	Games/gamification
6.	Showing value
7.	Developing the L&D function
8.	Video
9.	Open everything (badges, MOOCs...)
10.	Synchronous online delivery
11.	Other:
12.	Neuroscience/cognitive science
13.	Knowledge management
14.	The cloud
15.	Talent management

2016◆	
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10.	Developing the L&D function
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14.	MOOCs
15.	Wearable tech
16.	Other:

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15.	Other:
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11. Other:
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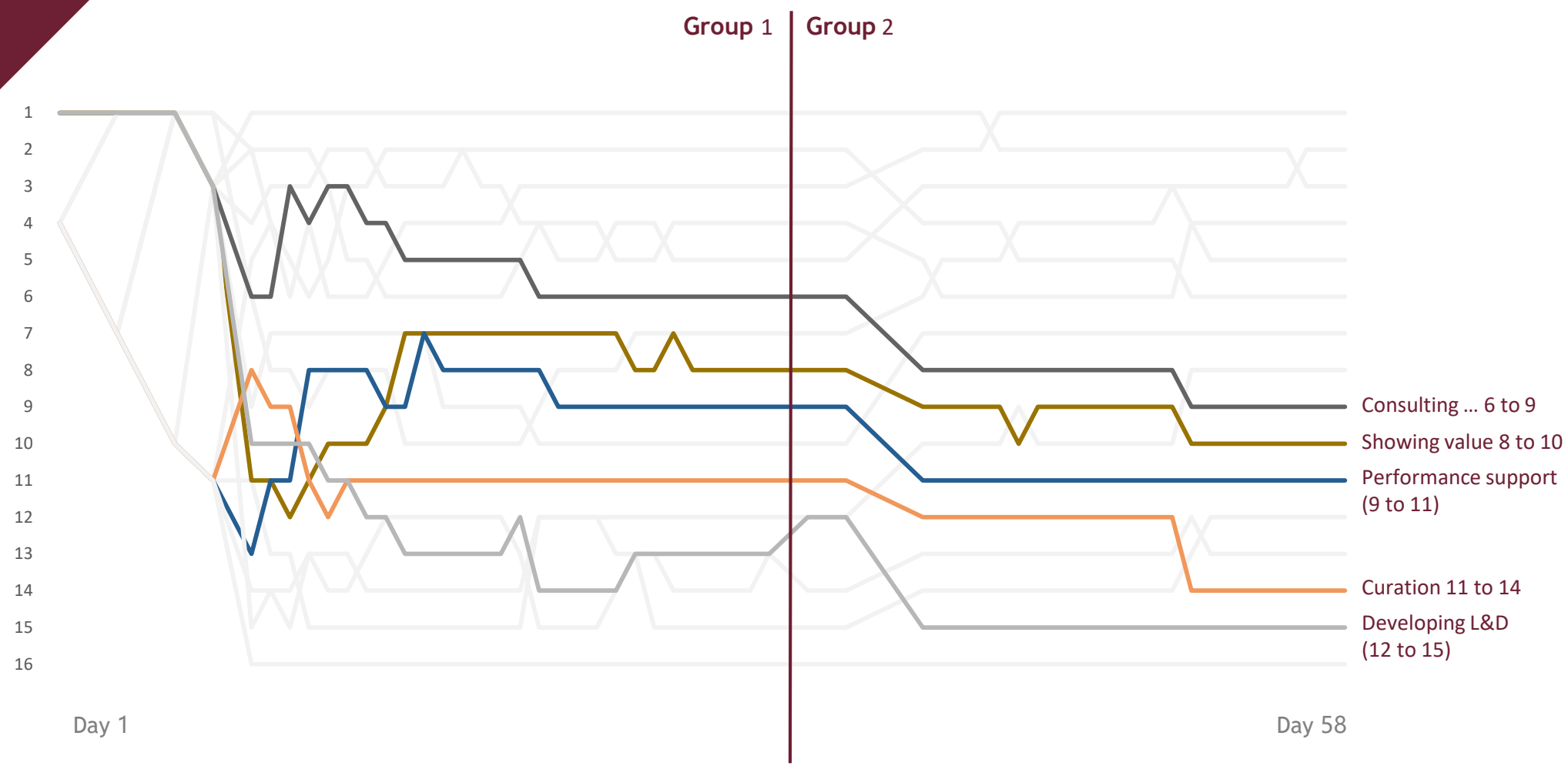15. Developing the L&D function
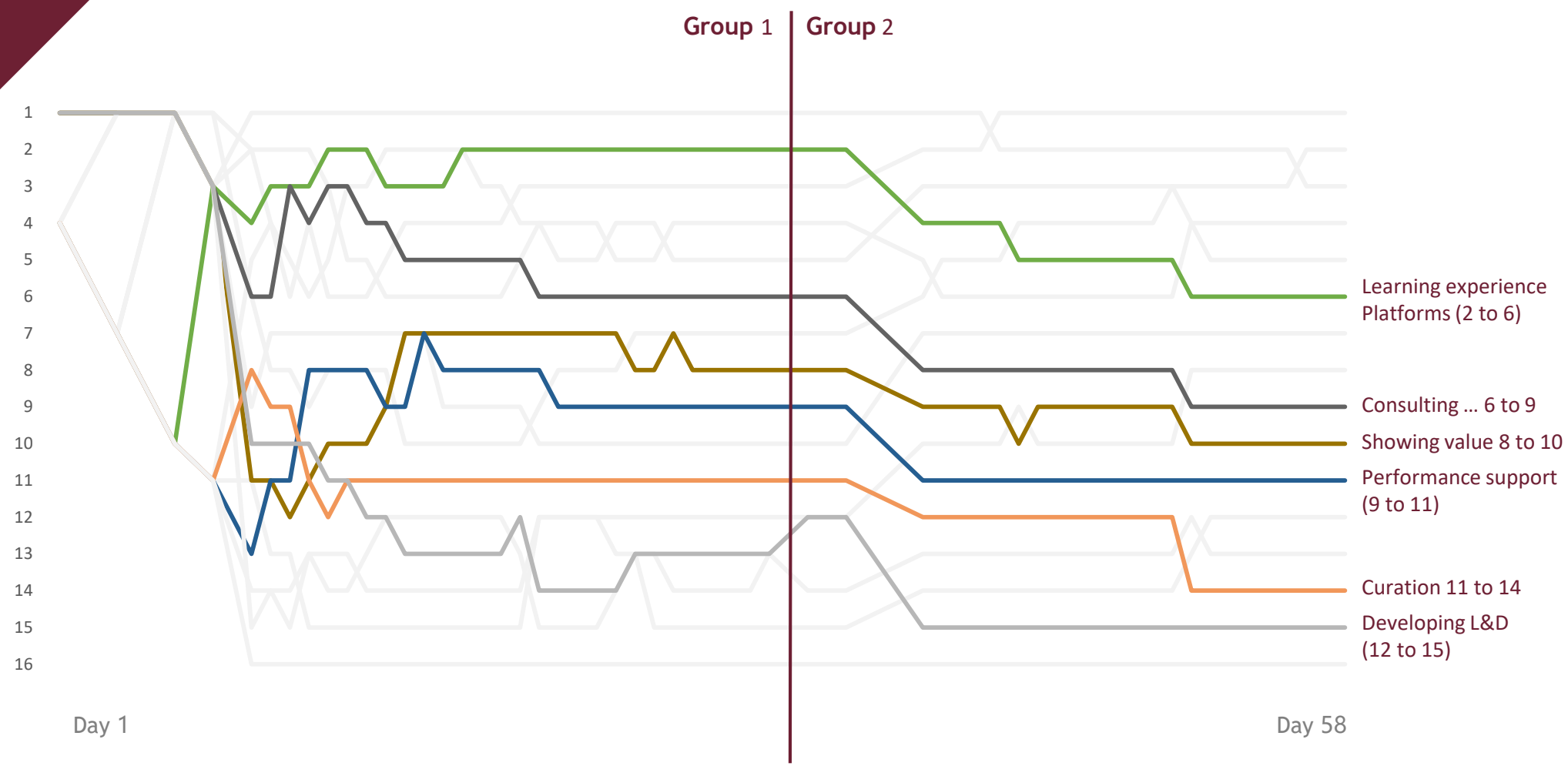16. Other:

Votes 2015	619
Votes 2016	1,922
Votes 2017	2,361
Votes 2018	2,894
Votes 2019	5,332

Two groups

Group 1 | Group 2

1
2
3
4
5
6
7
8
9
10
11
12
13
14
15
16

Consulting ... 6 to 9
Showing value 8 to 10
Performance support (9 to 11)
Curation 11 to 14
Developing L&D (12 to 15)

Day 1
Day 58

Two groups

Group 1   Group 2

Learning experience Platforms (2 to 6)

Consulting ... 6 to 9

Showing value 8 to 10

Performance support (9 to 11)

Curation 11 to 14

Developing L&D (12 to 15)

Day 1   Day 58

Exploring the results

1

Personalisation and collaboration

2

Persistent technologies

3

Falling from favour

4

A world
of difference

A world of difference

Voting varies by region

◆ Europe and the UK – similar

◆ Australia & New Zealand and India – often similar

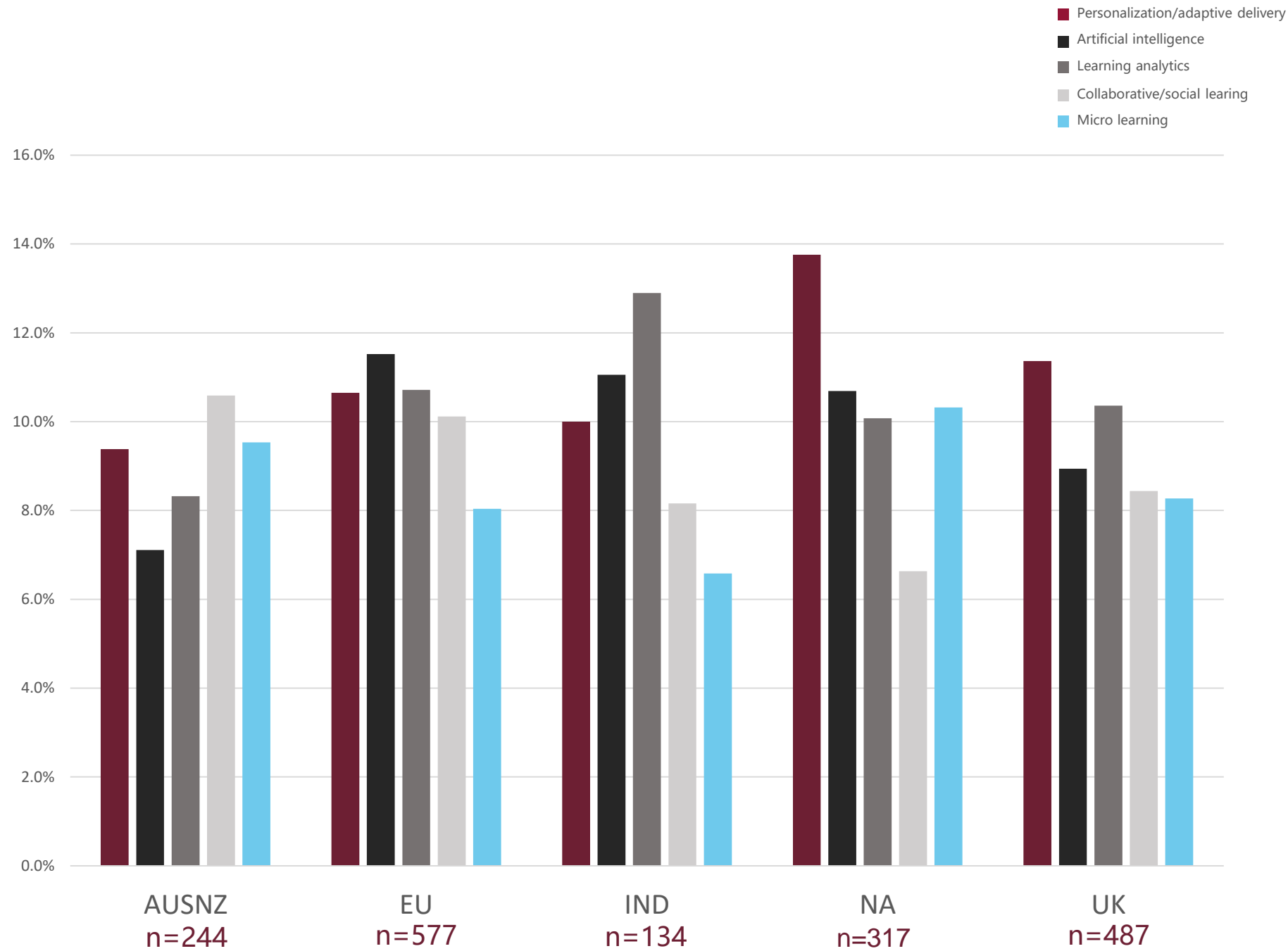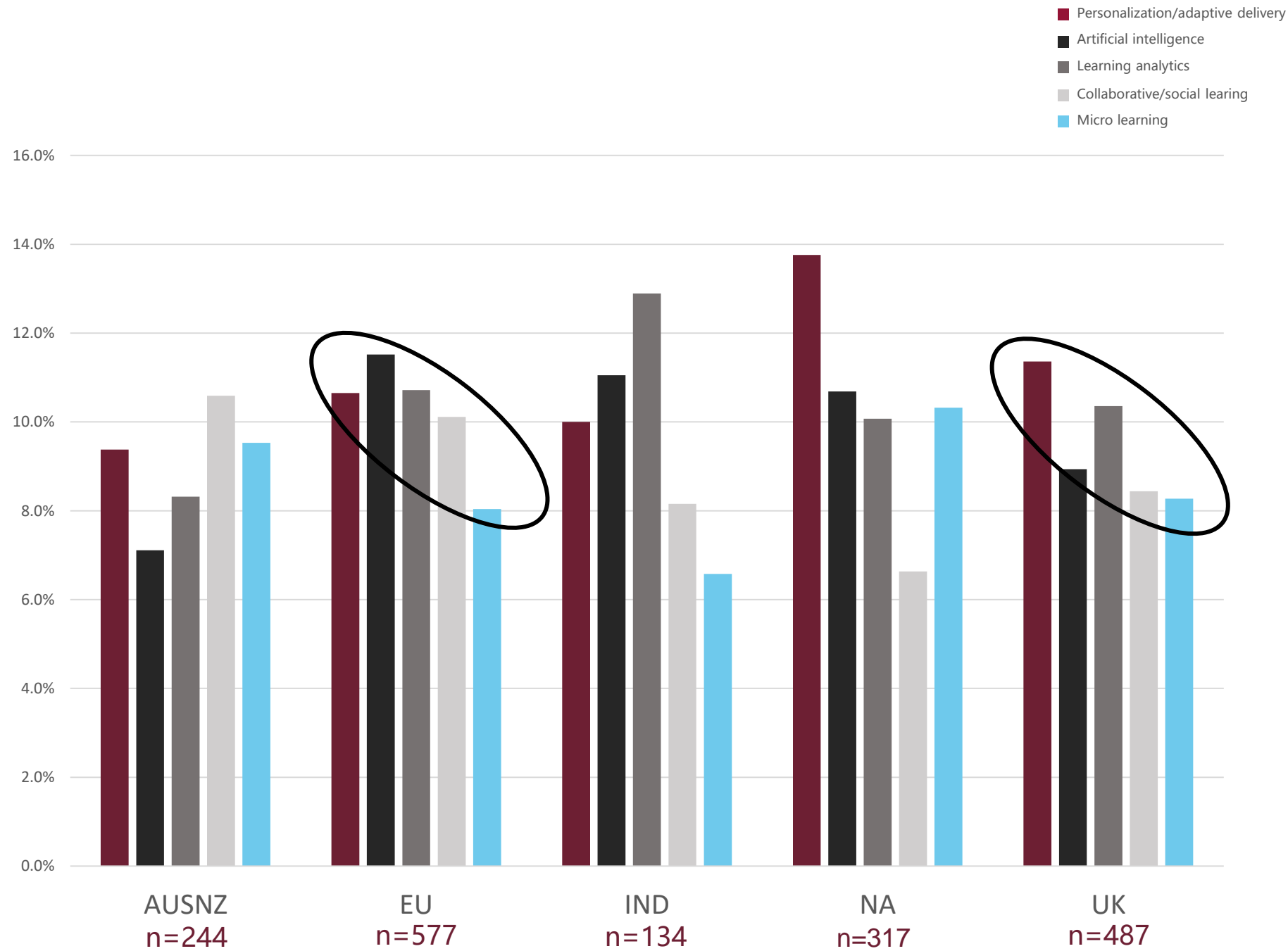◆ North America – outlier. Sometimes sets trends, sometimes follows them.

The top 5 options

Top 5 options by region
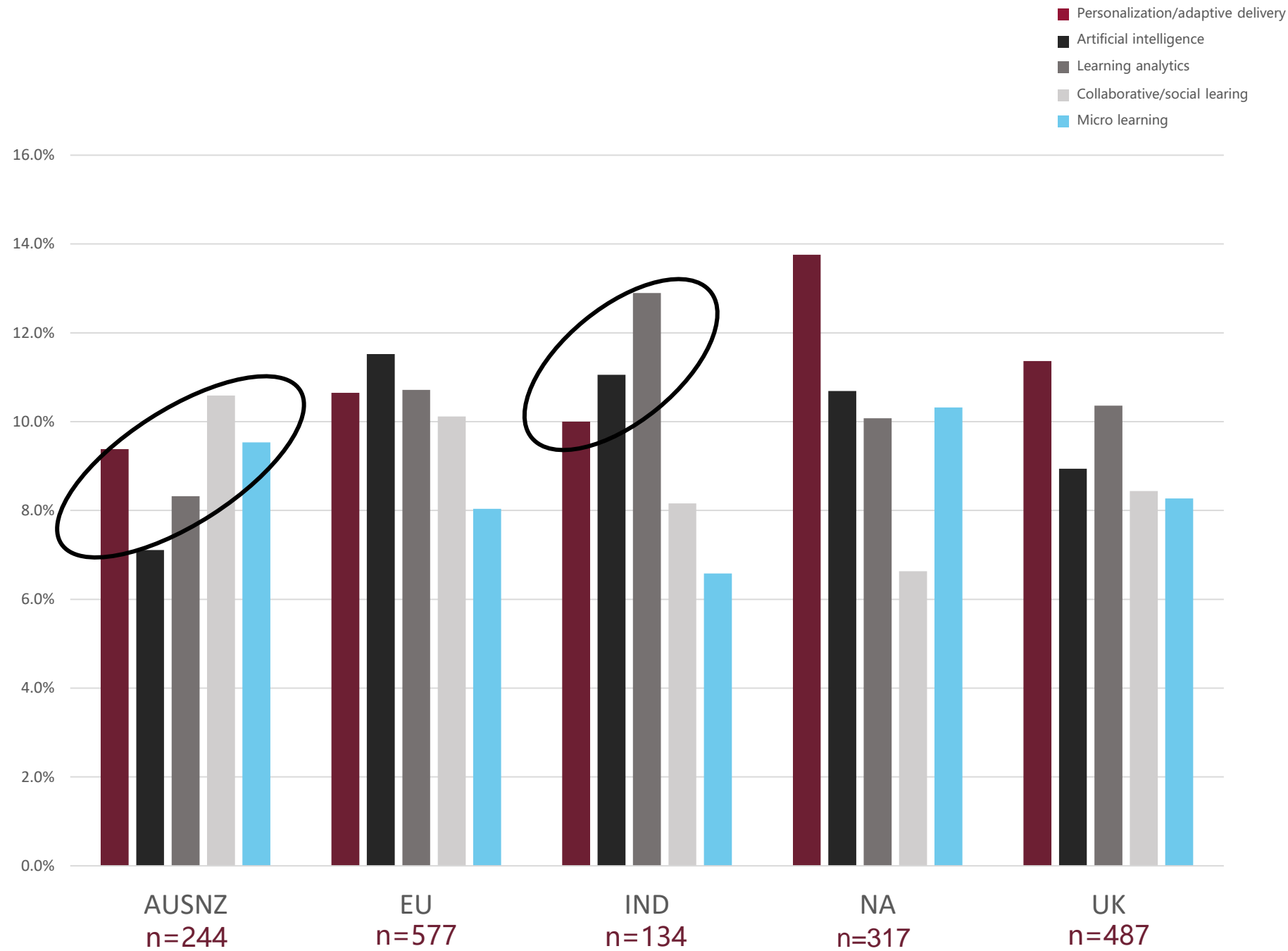
Legend:
- Personalization/adaptive delivery
- Artificial intelligence
- Learning analytics
- Collaborative/social learing
- Micro learning

AUSNZ n=244
EU n=577
IND n=134
NA n=317
UK n=487

Top 5 options by region

Legend:
- Personalization/adaptive delivery
- Artificial intelligence
- Learning analytics
- Collaborative/social learing
- Micro learning

AUSNZ n=244
EU n=577
IND n=134
NA n=317
UK n=487

Top 5 options by region

| | Personalization/adaptive delivery | Artificial intelligence | Learning analytics | Collaborative/social learing | Micro learning |

Top 5 options by region

Personalization/adaptive delivery

Legend: 2016, 2017, 2018, 2019

AUS&NZ n=244 | EU n=577 | IND n=134 | NA n=317 | RoW n=195 | UK n=487

Vote over time: Micro learning

5

It's time to think about the future

Data

Profession

Teams

Toolbox

Top trends in L&D for 2019

Donald H Taylor
Chairman
Learning and Performance Institute

www.donaldhtaylor.co.uk/gss