Learning and Development
Global Sentiment Survey
2023

Sponsors
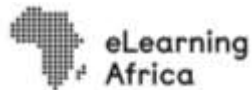
speexx empowering communication

netex INNOVATIVE LEARNING EXPERIENCES

OpenSesame

learningpool

NOMADIC

getabstract

Media Partners

eLearning Africa

OVERLAP

LPI Involve. Inform. Inspire.

learning news

learning technologies

1

Results **for 2023**

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

Global Sentiment Survey 2023

NA 9%

SA 7%

UK 16%

EUR 34%

AFR 3%

W ASIA 7%

S ASIA 3%

SE ASIA 11%

SWP 7%

Caveat: A non-representative sample

2.5%
Innovators

Early
Adopters
13.5%

Early
Majority
34%

Late
Majority
34%

Laggards
16%

Diffusion of innovation curve, Everett Rogers

Caveat: A non-representative sample

2.5%
Innovators

Early
Adopters
13.5%

Early
Majority
34%

Late
Majority
34%

Laggards
16%

Diffusion of innovation curve, Everett Rogers

Caveat: A non-representative sample

2.5% Innovators

Early Adopters 13.5%

Early Majority 34%

Late Majority 34%

Laggards 16%
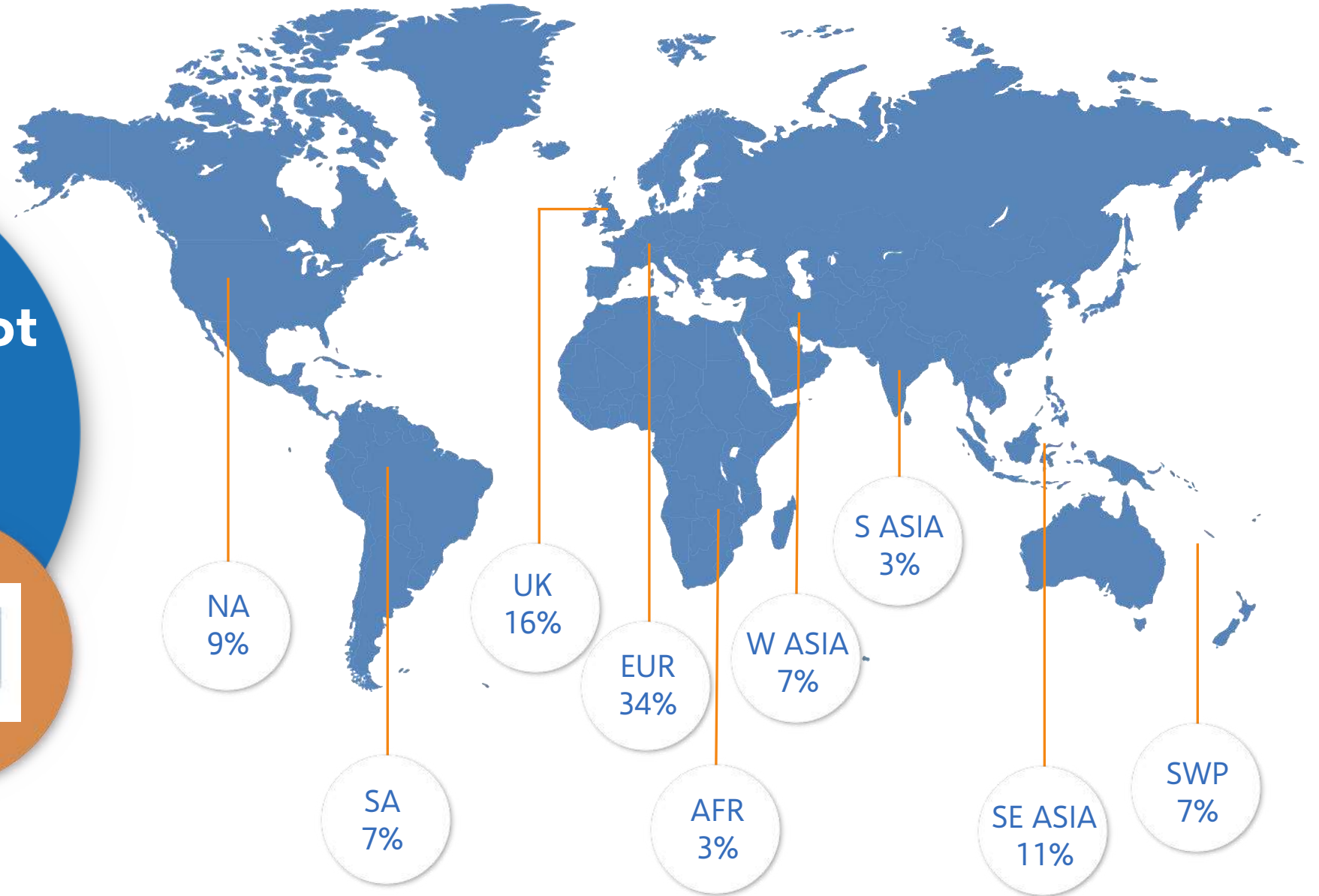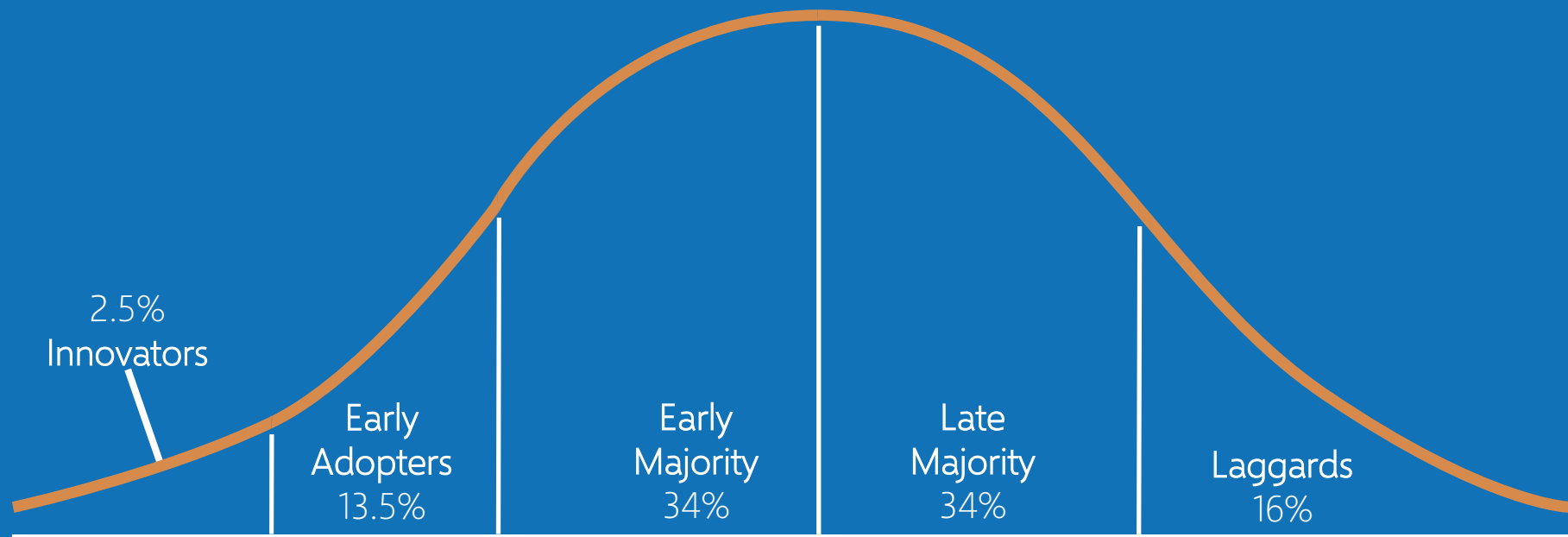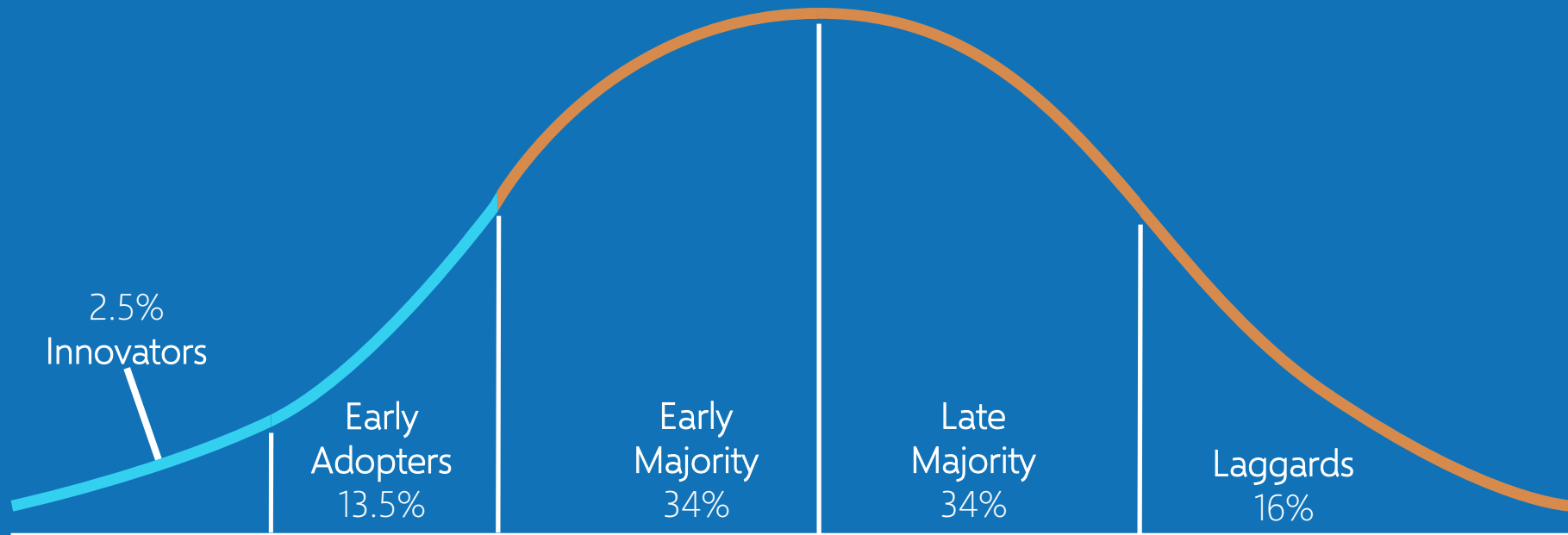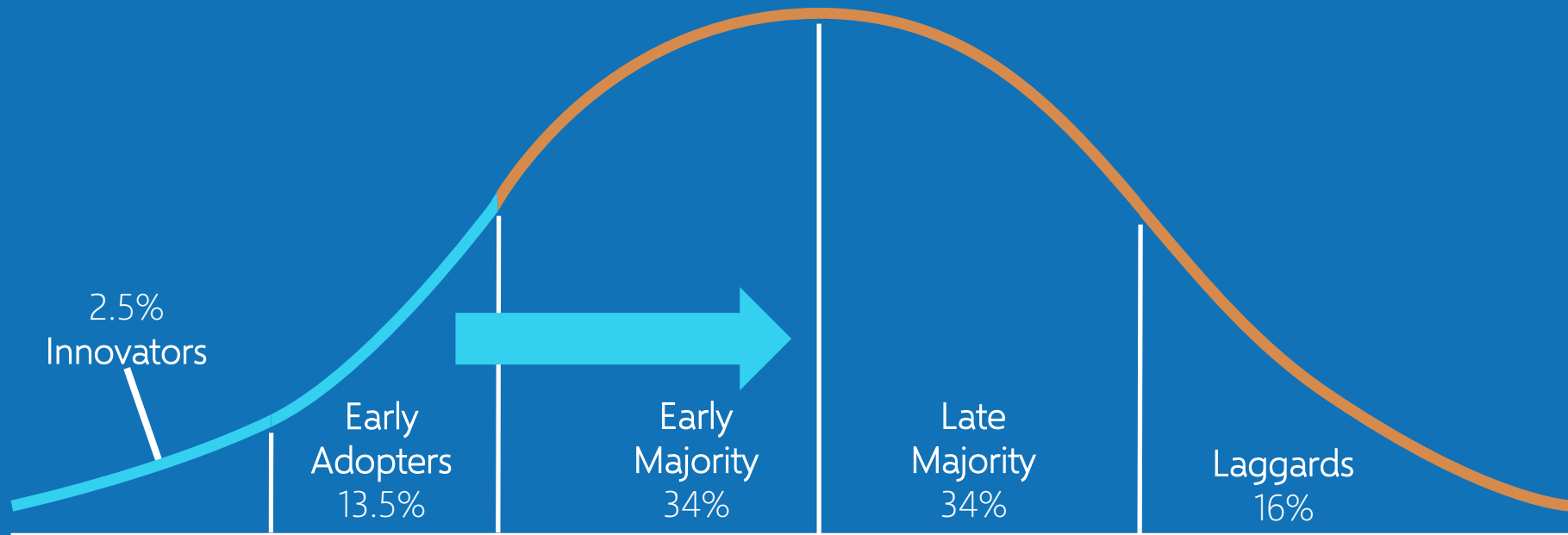
Diffusion of innovation curve, Everett Rogers

Which best describes where you work?
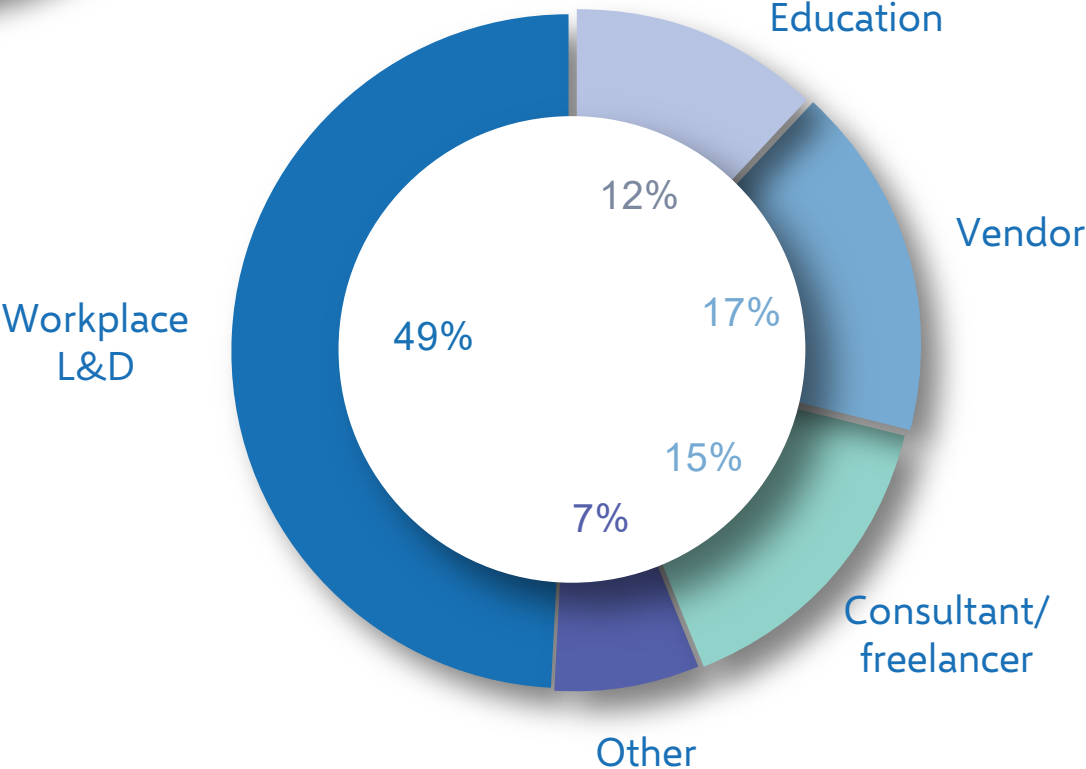
Education 12%

Vendor 17%

Consultant/ freelancer 15%

Other 7%

Workplace L&D 49%

Multiple-choice
n = 3,435 (86%)

Which best describes where you work?

Education 12%
Vendor 17%
Consultant/freelancer 15%
Other 7%
Workplace L&D 49%
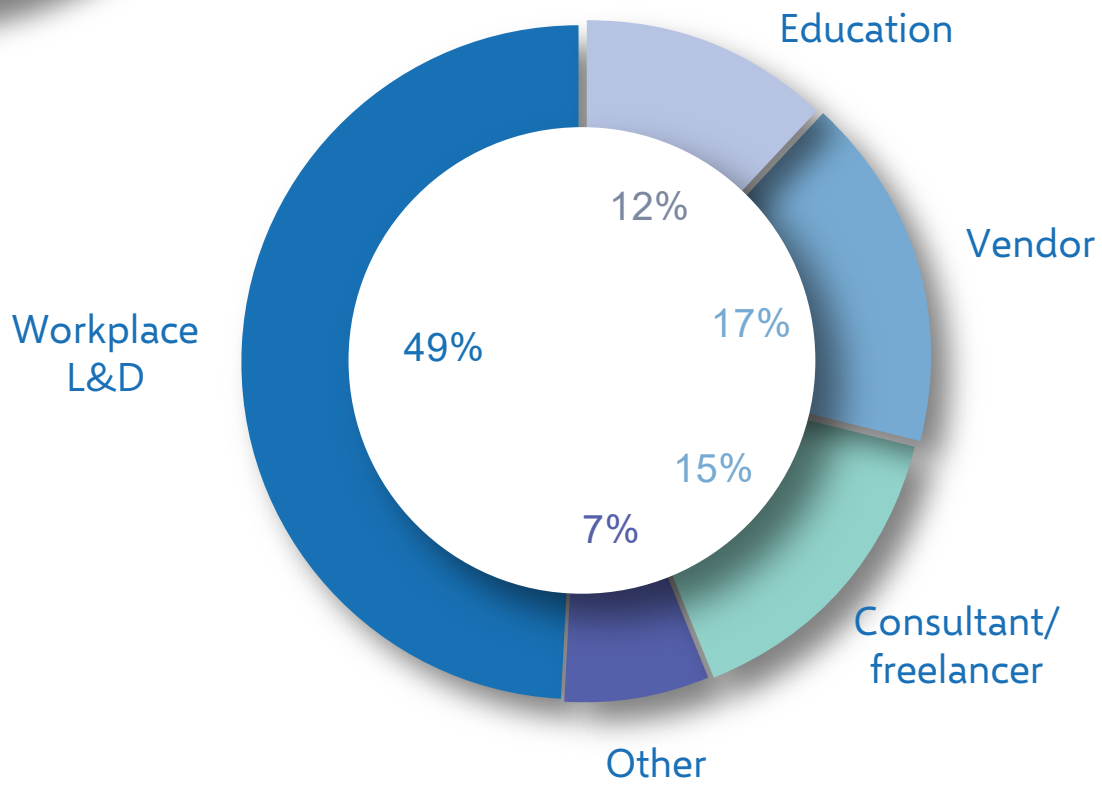
Multiple choice
n = 3,435 (86%)

Which best describes where you work?

Brazil

Education 14%
Vendor 14%
Workplace L&D 49%
Consultant/freelancer 18%
Other 5%
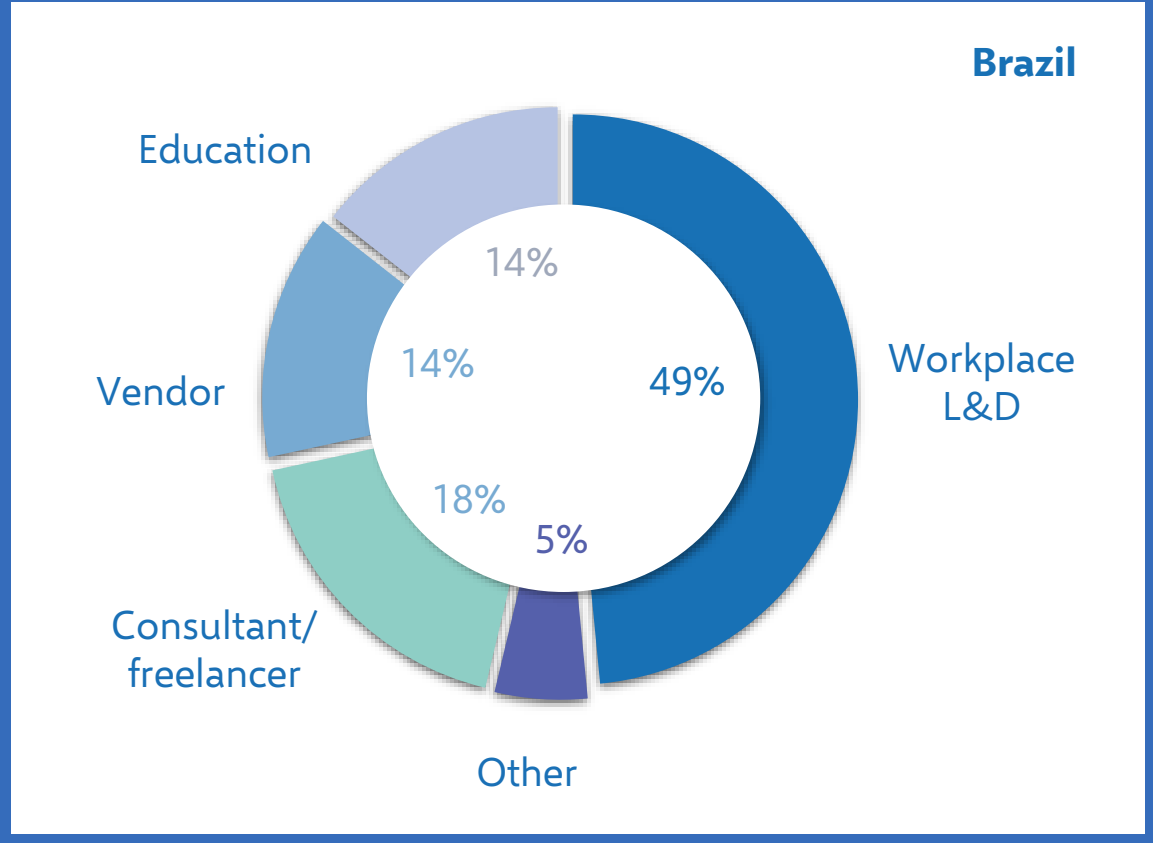
n = 229
(91% of 251)

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

Artificial intelligence

Coaching/mentoring

Collaborative/social learning

Consulting more deeply with the business

Learning analytics

Learning experience platforms

Micro learning

Performance support

Personalization/adaptive delivery

Mobile delivery

Reskilling/upskilling

Skills-based talent management

Showing value

The Metaverse*

Virtual and augmented reality

Other

*New in 2023

GSS 2023		Δ%
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

The World and Brazil

GSS 2023 All other countries	
1. Reskilling/upskilling	12.2%
2. Artificial intelligence	9.5%
3. Skills-based talent management	9.1%
4. Learning analytics	7.6%
5. Coaching/mentoring	7.6%
6. Personalization/adaptive delivery	7.3%
7. Collaborative/social learning	7.0%
8. Consulting more deeply with the business	6.7%
9. Showing value	6.5%
10. Learning experience platforms	5.9%
11. Micro learning	5.9%
12. Performance support	5.0%
13. Virtual and augmented reality	3.6%
14. The Metaverse	2.5%
15. Mobile delivery	2.2%
16. Other	1.4%
n = 3,745	

GSS 2023 Brazil	
1. Collaborative/social learning	13.9%
2. Personalization/adaptive delivery	10.5%
3. Learning analytics	9.3%
4. Micro learning	9.3%
5. Reskilling/upskilling	9.2%
6. Skills-based talent management	8.1%
7. Learning experience platforms	8.1%
8. Consulting more deeply with the business	6.1%
9. Artificial intelligence	5.5%
10. Coaching/mentoring	5.0%
11. The Metaverse	3.8%
12. Showing value	3.8%
13. Performance support	3.1%
14. Virtual and augmented reality	1.6%
15. Mobile delivery	1.6%
16. Other	0.9%
n = 251	

The World and Brazil

GSS 2023 All other countries	
1. Reskilling/upskilling	12.2%
2. Artificial intelligence	9.5%
3. Skills-based talent management	9.1%
4. Learning analytics	7.6%
5. Coaching/mentoring	7.6%
6. Personalization/adaptive delivery	7.3%
7. Collaborative/social learning	7.0%
8. Consulting more deeply with the business	6.7%
9. Showing value	6.5%
10. Learning experience platforms	5.9%
11. Micro learning	5.9%
12. Performance support	5.0%
13. Virtual and augmented reality	3.6%
14. The Metaverse	2.5%
15. Mobile delivery	2.2%
16. Other	1.4%
n = 3,745	

GSS 2023 Brazil	
1. Collaborative/social learning	13.9%
2. Personalization/adaptive delivery	10.5%
3. Learning analytics	9.3%
4. Micro learning	9.3%
5. Reskilling/upskilling	9.2%
6. Skills-based talent management	8.1%
7. Learning experience platforms	8.1%
8. Consulting more deeply with the business	6.1%
9. Artificial intelligence	5.5%
10. Coaching/mentoring	5.0%
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13. Performance support	3.1%
14. Virtual and augmented reality	1.6%
15. Mobile delivery	1.6%
16. Other	0.9%
n = 251	

2

Reskilling & upskilling

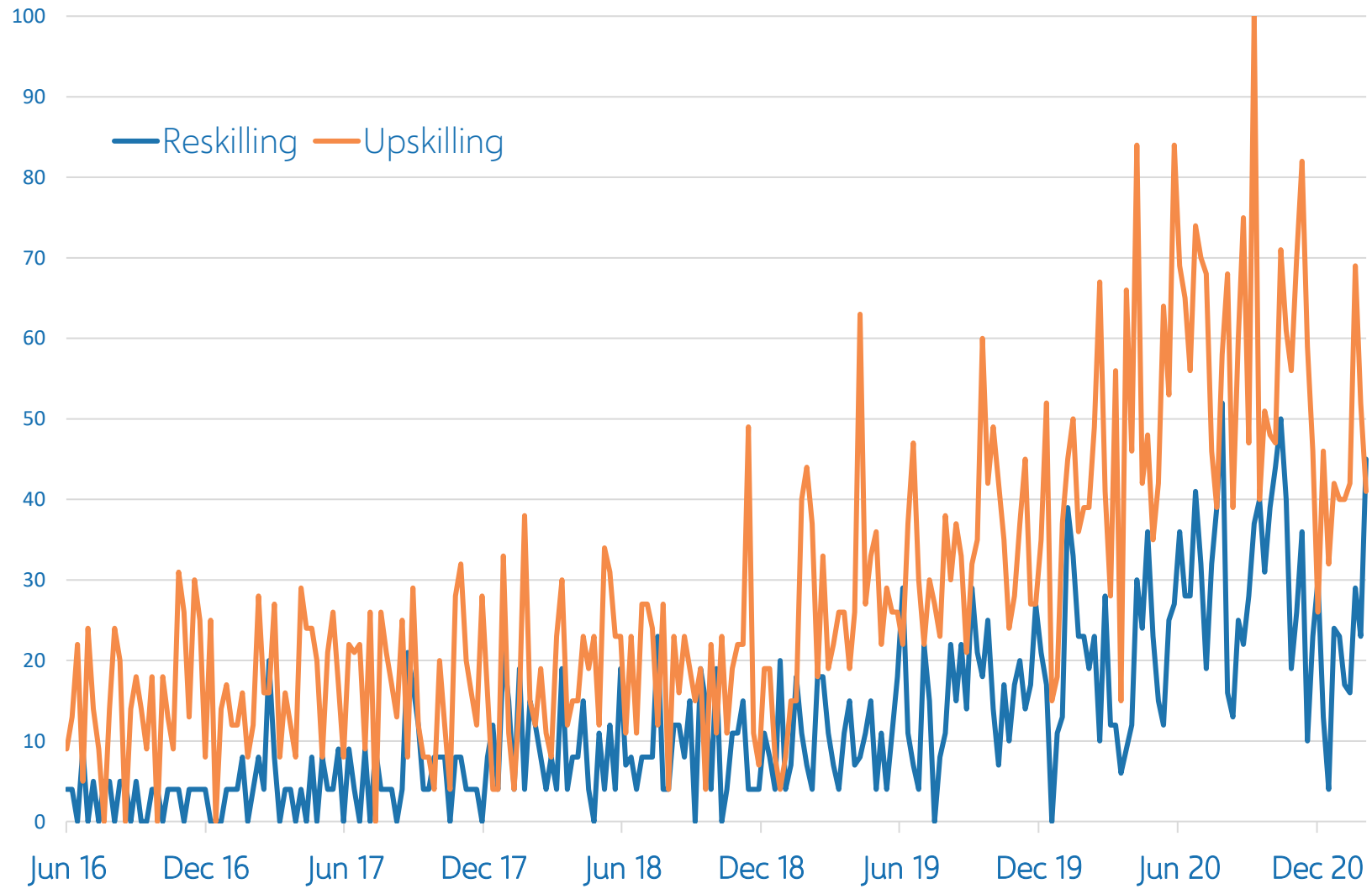| GSS 2023		Δ%
1. Reskilling/upskilling (1)	12.0%	↓
2. Artificial intelligence (12)	9.2%	↑
3. Skills-based talent management (6)	9.0%	↑
4. Learning analytics (5)	7.8%	↑

Definitions

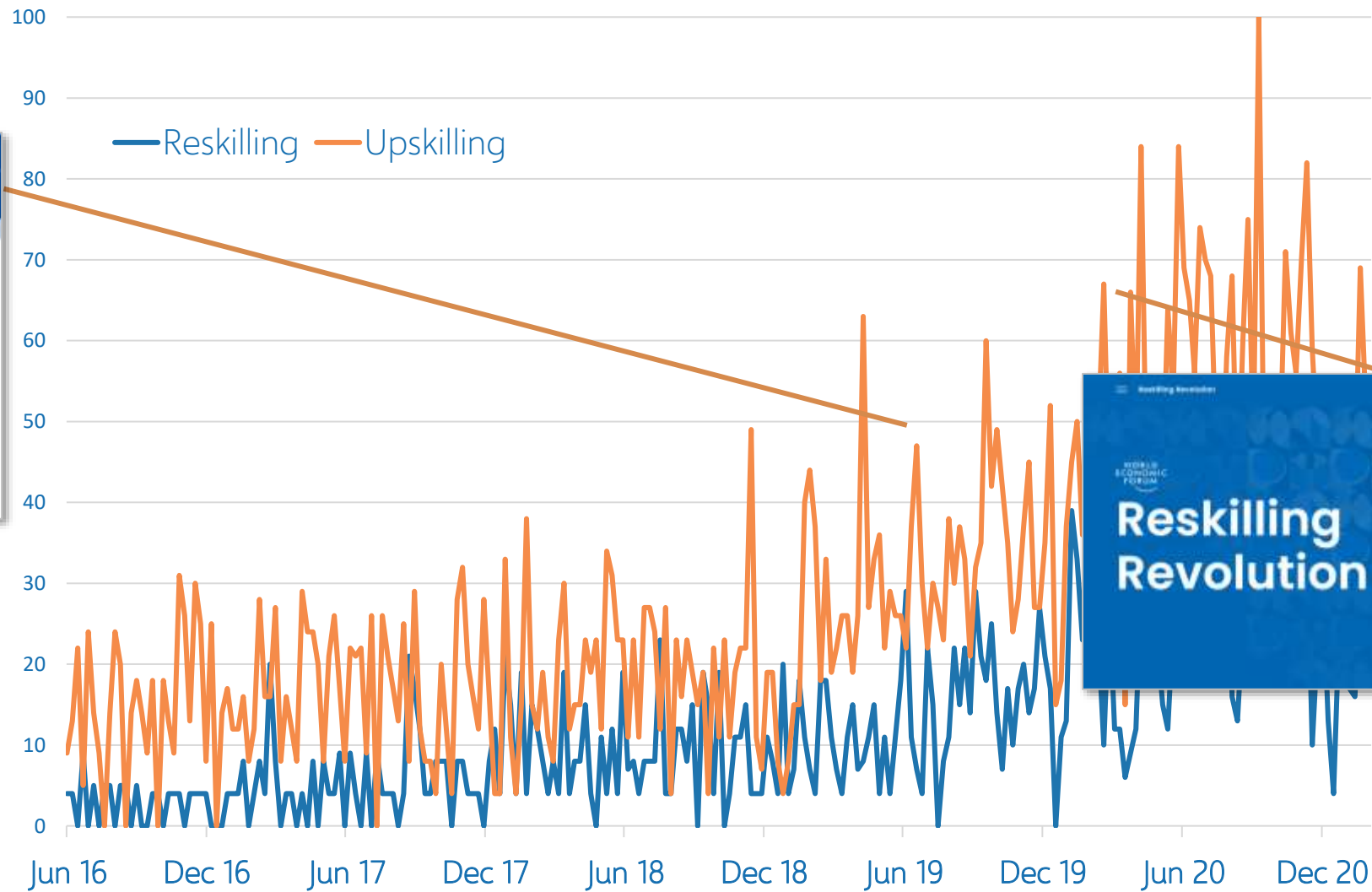**Reskilling** ➡ **New skills for a different job**

Upskilling ➡ **New skills for your current/future job**

Global Google searches for Reskilling and Upskilling
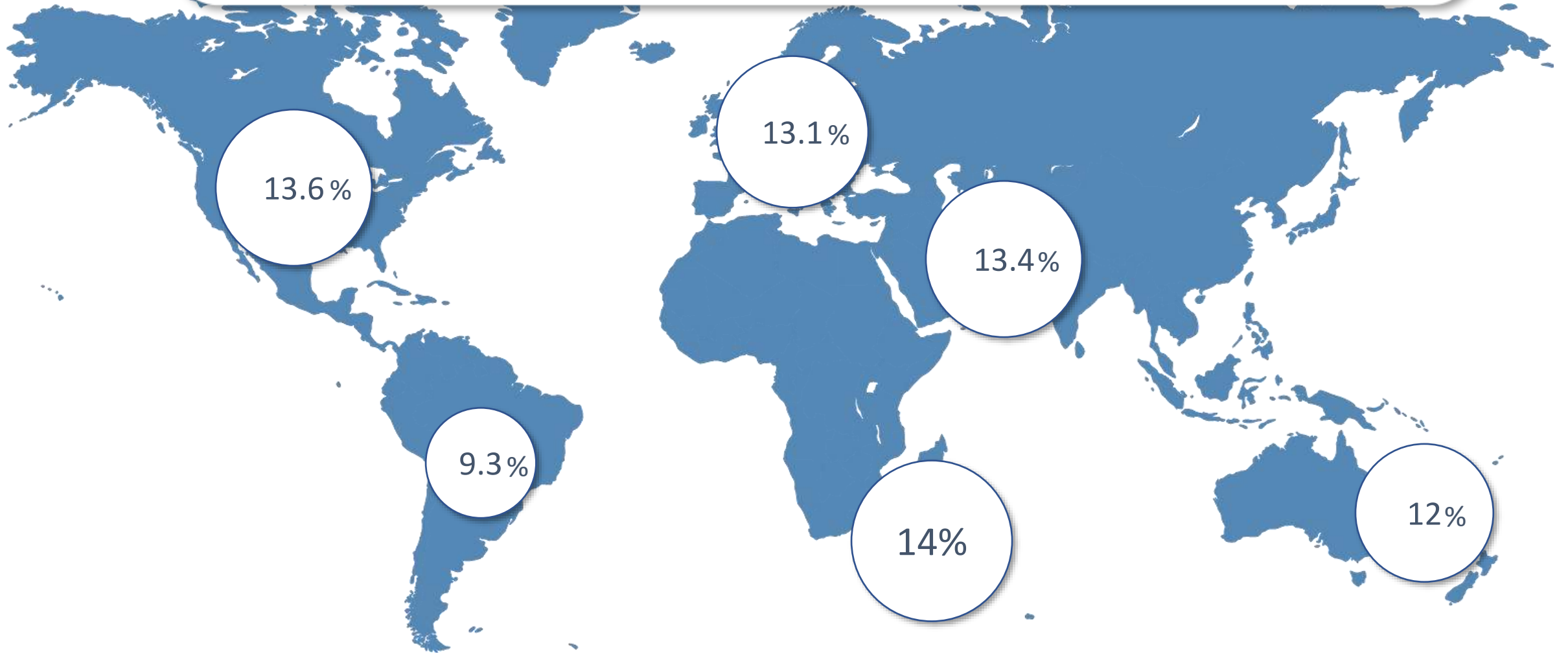
Global Google searches for Reskilling and Upskilling

Reskilling   Upskilling

6 – 7 June 2019,
Upskilling Adults conference
European Union

22 January 2020
Reskilling Revolution
World Economic Forum

GSS 2021: Votes for Reskilling/upskilling world-wide

13.6 %

13.1 %

13.4 %

9.3 %

14%

12 %

GSS 2023: Votes for Reskilling/upskilling world-wide
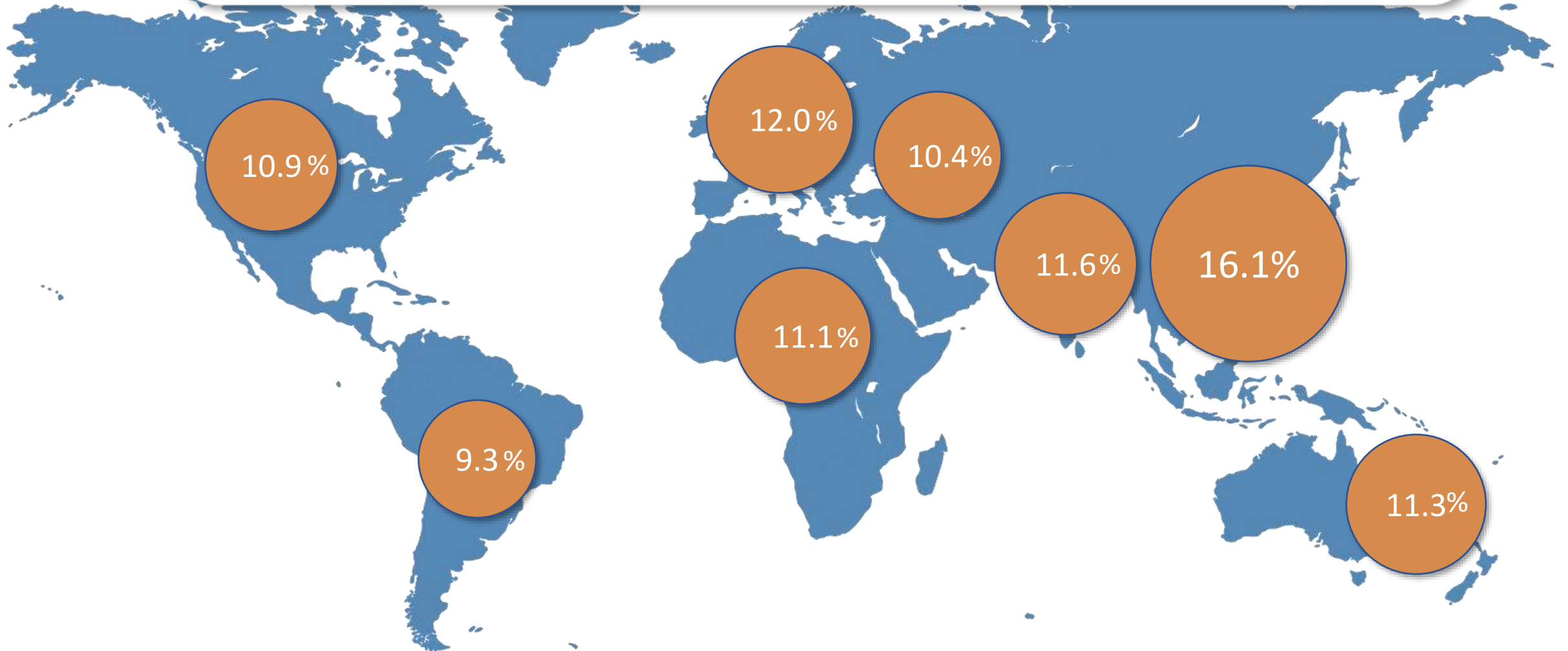
Brazil and the world: Re- and up-skilling

3

Focus on

Artificial intelligence

GSS 2023	Δ%
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% ↓

Options trend downwards over time
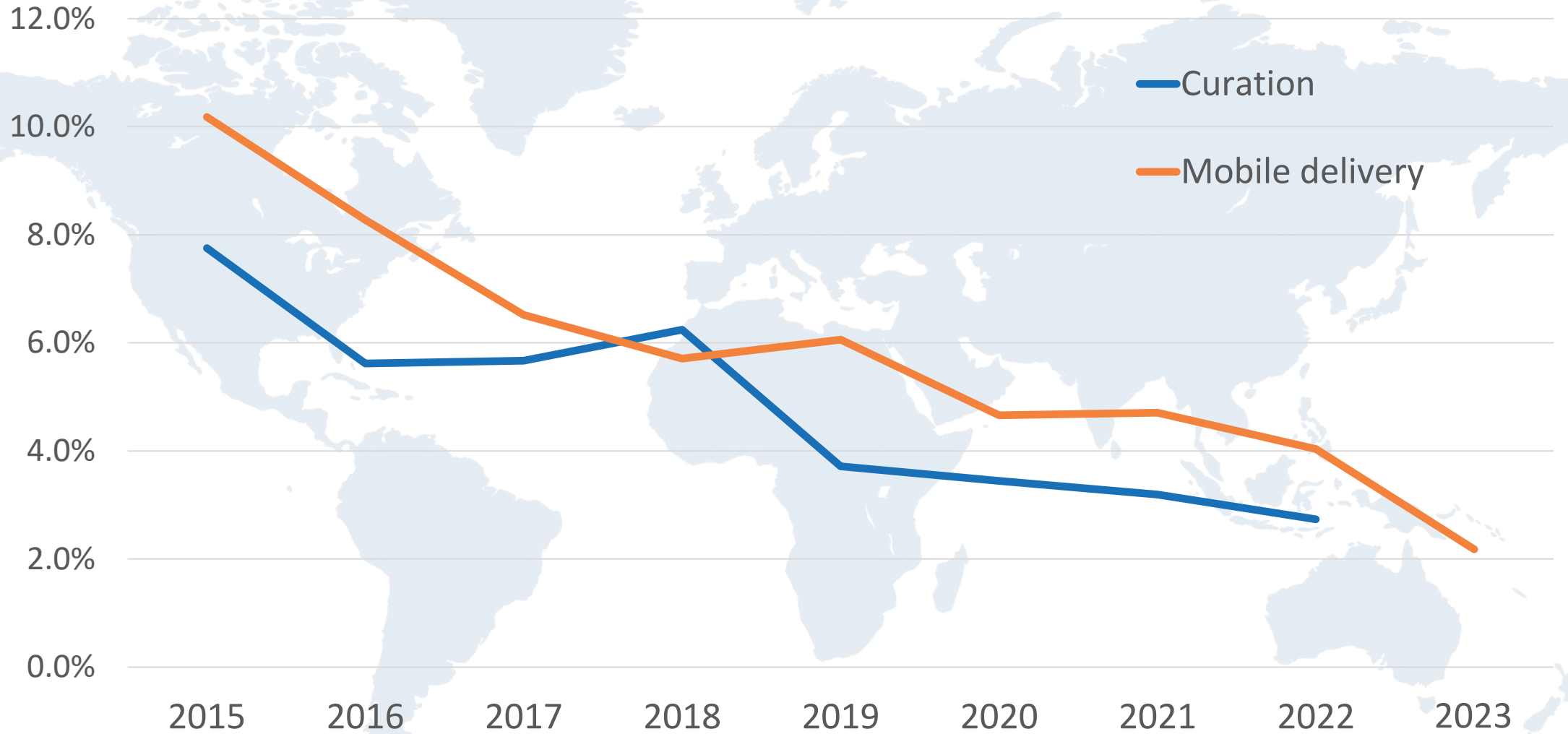
Artificial intelligence – against the trend

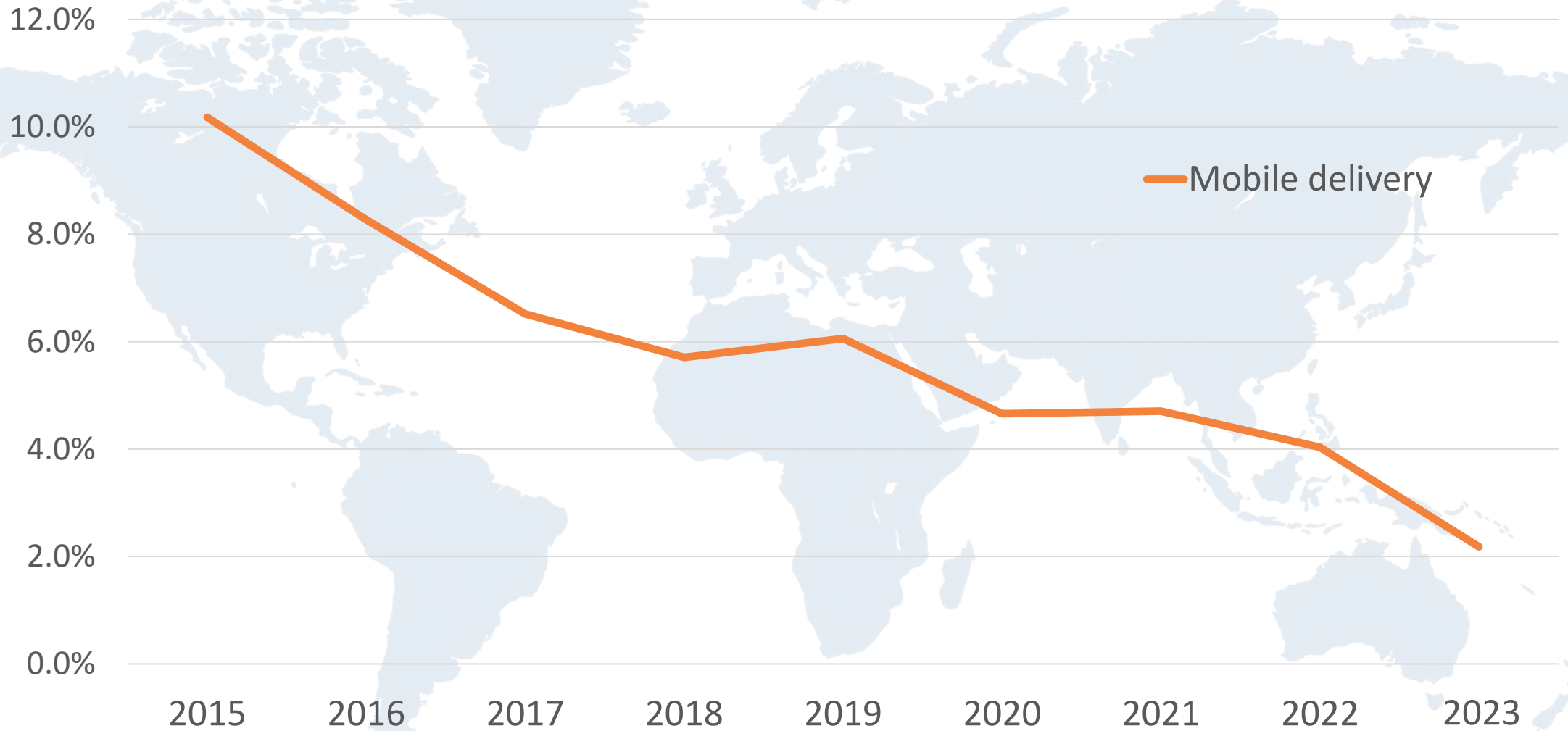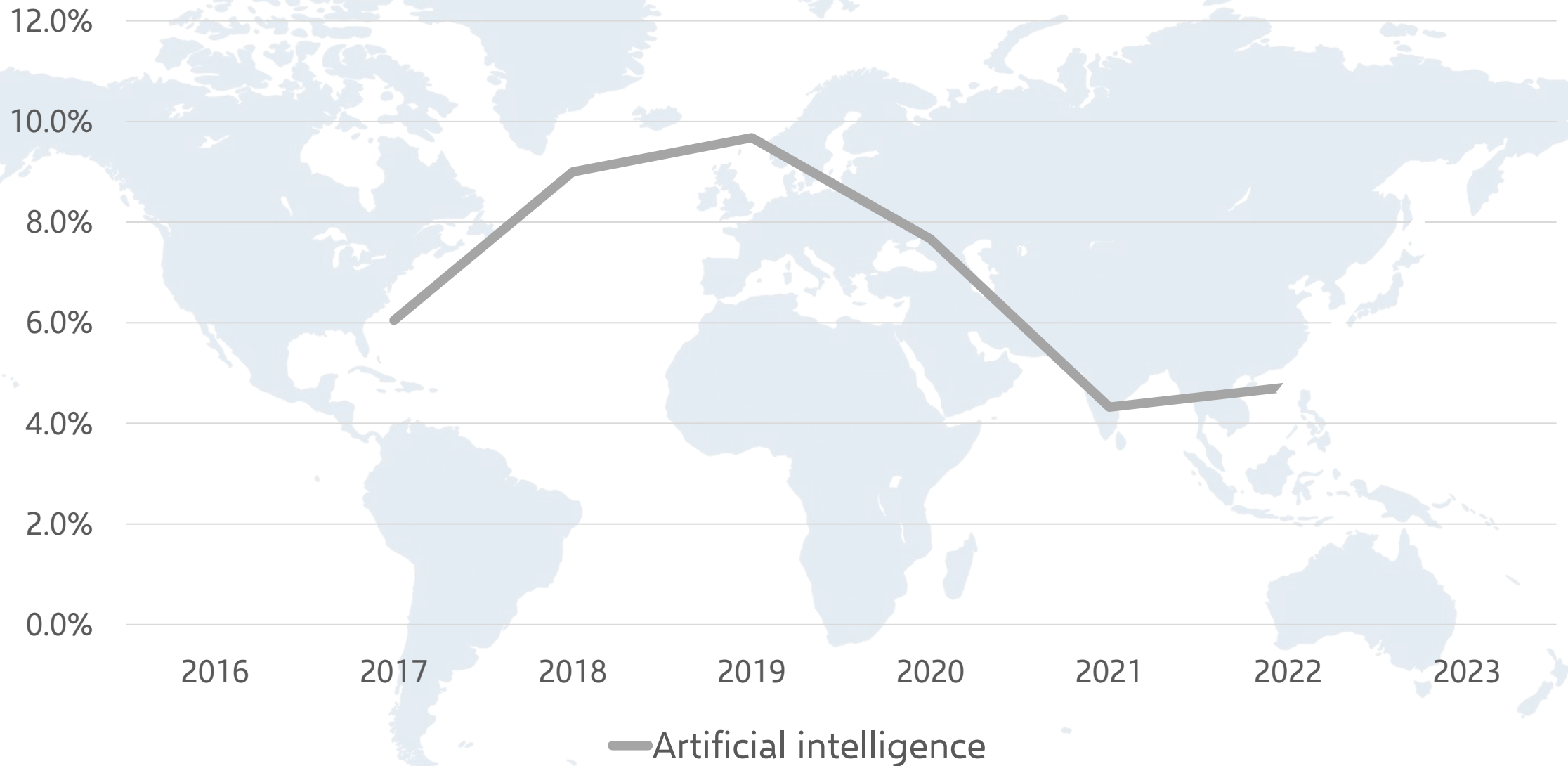# Artificial intelligence – against the trend
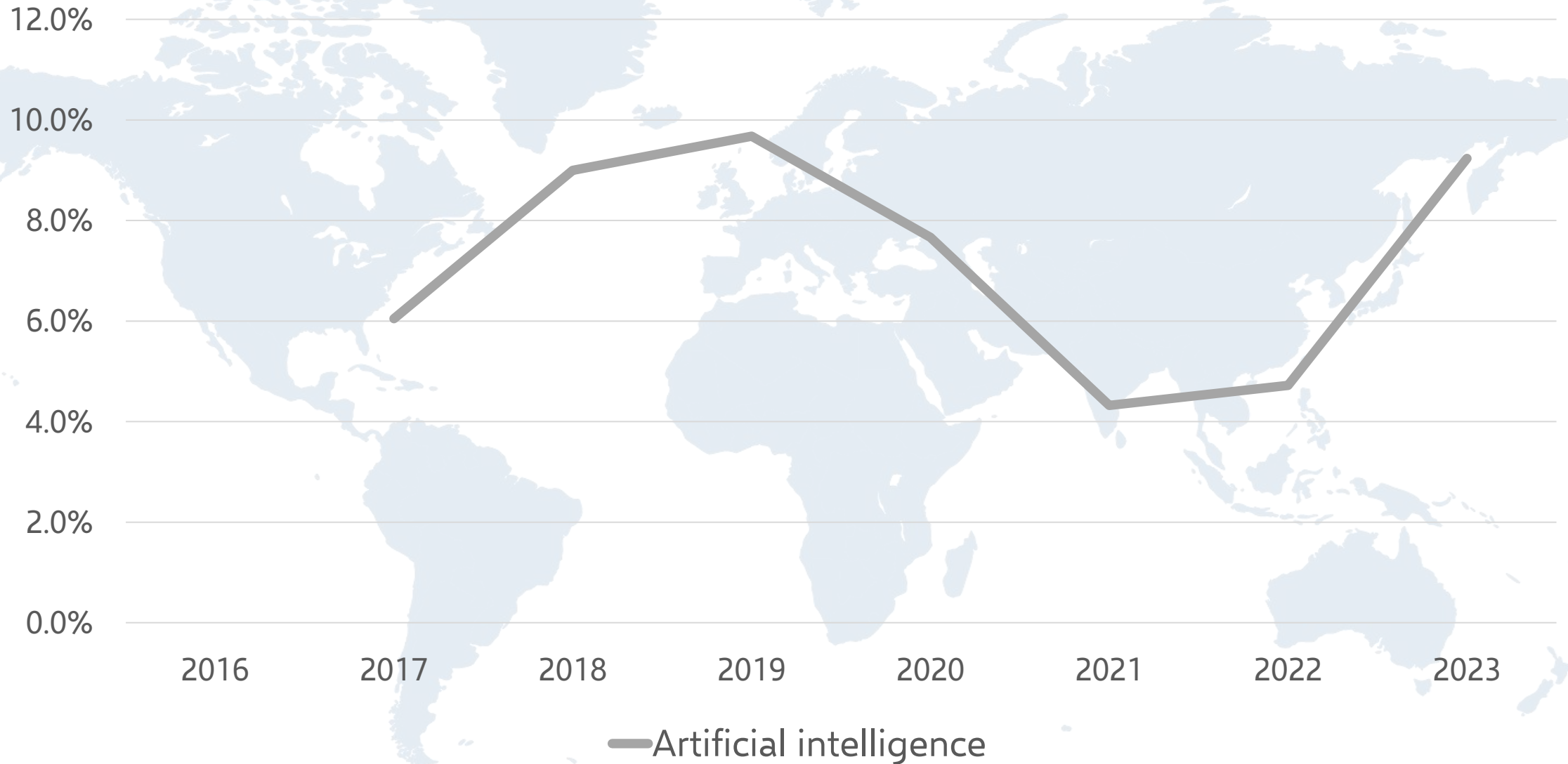
ChatGPT: Optimizing Language Models for Dialogue

We've trained a model called ChatGPT which interacts in a conversational way. The dialogue format makes it possible for ChatGPT to answer followup questions, admit its mistakes, challenge incorrect premises, and reject inappropriate requests. ChatGPT is a sibling model to InstructGPT, which is trained to follow an instruction in a prompt and provide a detailed response.

TRY CHATGPT ↗

November 30, 2022
13 minute read

Google Trends interest in 'ChatGPT' world-wide
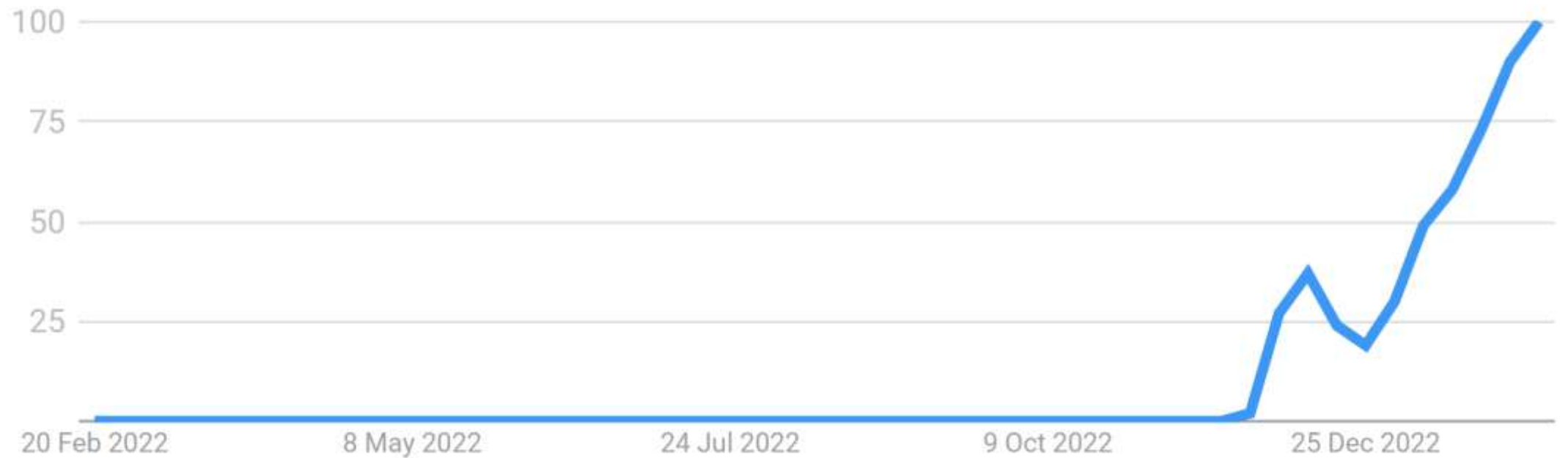
Google Trends interest in 'ChatGPT' world-wide

100

75

50

25

20 Feb 2022   8 May 2022   24 Jul 2022   9 Oct 2022   25 Dec 2022

30 November
ChatGPT launched

8 December:
Survey launched
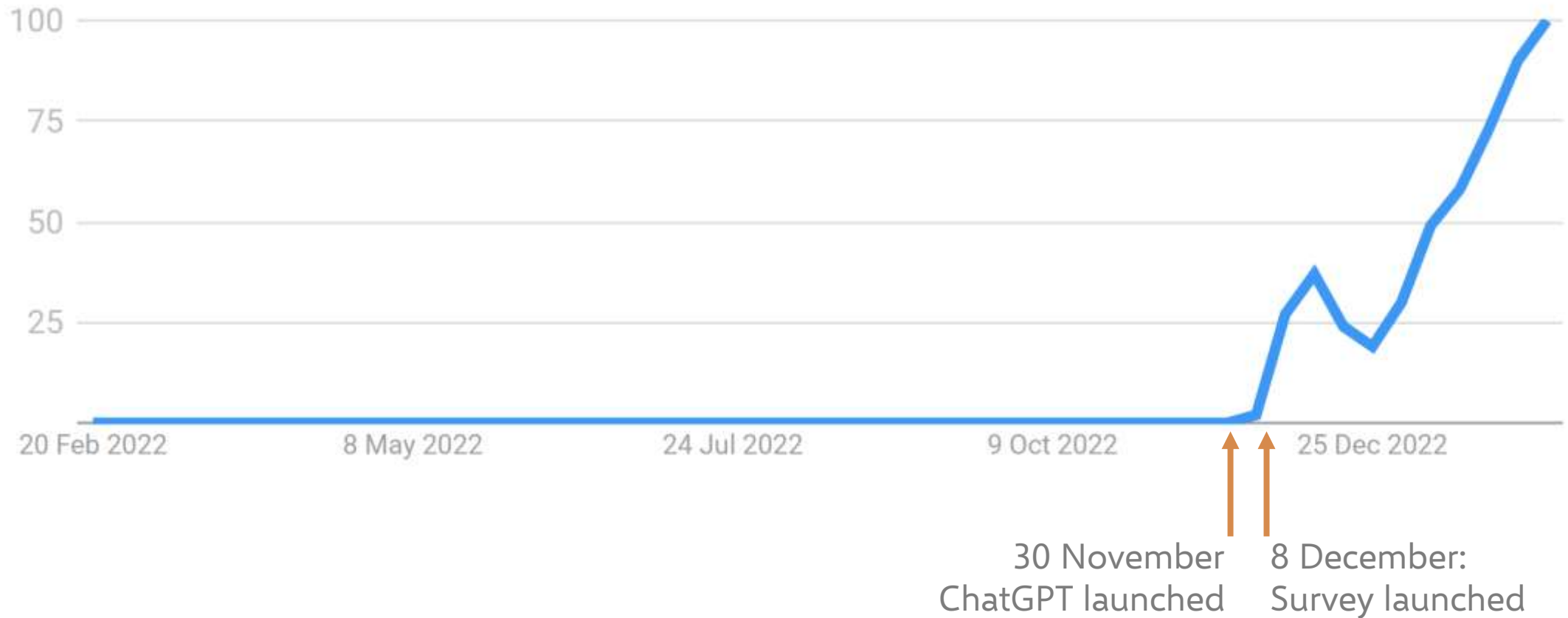
Workplace L&D	Self-employed	Vendors	Education
?	?	?	?

Workplace L&D	Self-employed	Vendors	Education

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

GSS 2023: Votes for AI by sector

Workplace L&D

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 learn...	6.1%
11.	Learning e...	5.8%
12.	Performan...	5.3%
13.	Virtual and ...	3.2%
14.	The Metav...	2.2%
15.	Mobile de...	2.0%
16.	Other	0.9%

n = 1,687... ...ding

6.9%

Self-employed

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 t...	7.5%
6.	Showing valu...	7.2%
7.	Coaching/me...	7.2%
8.	Personalizatio...	7.2%
9.	Learning ana...	6.3%
10.	Learning exp...	5.7%
11.	Performance...	5.2%
12.	Micro learnin...	5.0%
13.	Virtual and a...	3.8%
14.	The Metaver...	3.1%
15.	Other	2.5%
16.	Mobile deliv...	1.7%

n = 523, 15%... ...g

9.7%

Vendors

GSS 2023 Vendors

1.	Reskilling/upskilling	12.7%
2.	Artificial intelligence	10.3%
3.	Skills-based talent management	9.4%
4.	Consulting m... ...iness	8.2%
5.	Personalizatio...	8.0%
6.	Learning ana...	7.7%
7.	Showing valu...	6.8%
8.	Collaborative...	6.6%
9.	Micro learnin...	6.0%
10.	Coaching/me...	5.8%
11.	Learning exp...	5.4%
12.	Performance...	4.8%
13.	Virtual and a...	3.0%
14.	Mobile delive...	1.9%
15.	The Metaver...	1.7%
16.	Other	1.7%

n = 559, 16%... ...g

10.3%

Education

GSS 2023 Ed...

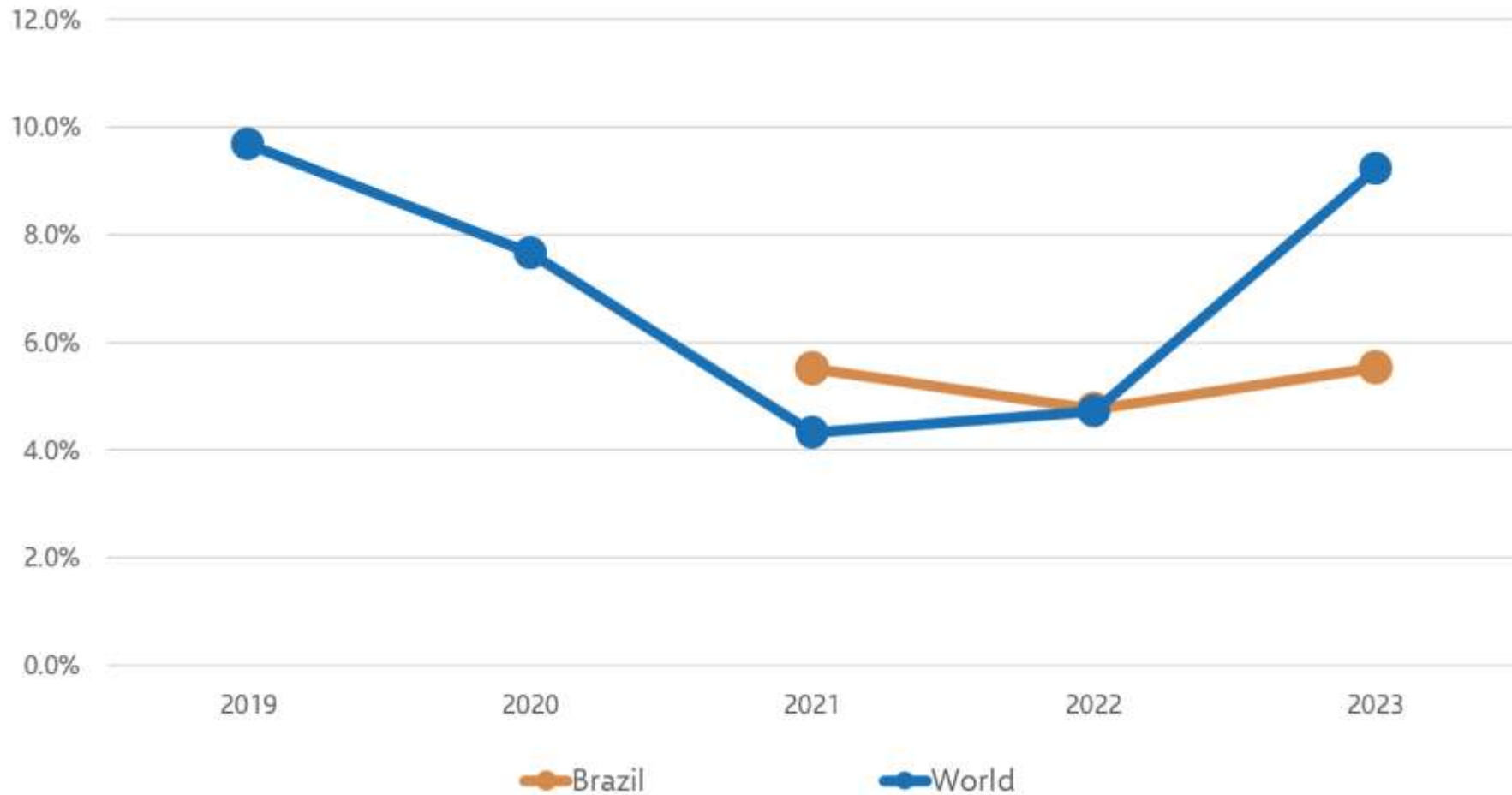|		
1.	Artificial intelli...	13.8%
2.	Reskilling/ups...	10.6%
3.	Micro learning...	8.8%
4.	Collaborative,...	8.2%
5.	Personalization...	7.8%
6.	Skills-based ta...	7.4%
7.	Learning anal...	7.4%
8.	Coaching/mer...	7.2%
9.	Learning expe...	6.9%
10.	Virtual and au...	4.7%
11.	The Metavers...	3.6%
12.	Consulting mo... ...iness	3.4%
13.	Showing value	3.4%
14.	Mobile delive...	3.0%
15.	Performance...	2.9%
16.	Other	1.0%

n = 419, 12%...

13.8%

Votes for Artificial intelligence world-wide

Brazil and the world: Artificial intelligence

Brazil and the US: AI

GSS 2023 United States	
1. Reskilling/upskilling	11.5%
2. Artificial intelligence	10.8%
3. Skills-based talent management	9.8%
4. Consulting more deeply with the business	8.3%
5. Learning analytics	8.2%
6. Personalization/adaptive delivery	7.8%
7. Coaching/mentoring	7.2%
8. Showing value	6.7%
9. Collaborative/social learning	6.5%
10. Micro learning	5.8%
11. Performance support	5.4%
12. Learning experience platforms	3.9%
13. Virtual and augmented reality	3.1%
14. Mobile delivery	2.4%
15. Other	1.3%
16. The Metaverse	1.2%
n = 276	

GSS 2023 Brazil	
1. Collaborative/social learning	13.9%
2. Personalization/adaptive delivery	10.5%
3. Learning analytics	9.3%
4. Micro learning	9.3%
5. Reskilling/upskilling	9.2%
6. Skills-based talent management	8.1%
7. Learning experience platforms	8.1%
8. Consulting more deeply with the business	6.1%
9. Artificial intelligence	5.5%
10. Coaching/mentoring	5.0%
11. The Metaverse	3.8%
12. Showing value	3.8%
13. Performance support	3.1%
14. Virtual and augmented reality	1.6%
15. Mobile delivery	1.6%
16. Other	0.9%
n = 251	

Brazil and the US: AI

GSS 2023 United States	
1. Reskilling/upskilling	11.5%
2. Artificial intelligence	10.8%
3. Skills-based talent management	9.8%
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15. Other	1.3%
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n = 276	

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n = 251	

4

Focus on **Collaborative/ social learning**

Brazil and the US: AI

GSS 2023 United States	
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n = 276	

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4. Micro learning	9.3%
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6. Skills-based talent management	8.1%
7. Learning experience platforms	8.1%
8. Consulting more deeply with the business	6.1%
9. Artificial intelligence	5.5%
10. Coaching/mentoring	5.0%
11. The Metaverse	3.8%
12. Showing value	3.8%
13. Performance support	3.1%
14. Virtual and augmented reality	1.6%
15. Mobile delivery	1.6%
16. Other	0.9%
n = 251	

Brazil and the US: Collaborative/social learning

GSS 2023 United States	
1. Reskilling/upskilling	11.5%
2. Artificial intelligence	10.8%
3. Skills-based talent management	9.8%
4. Consulting more deeply with the business	8.3%
5. Learning analytics	8.2%
6. Personalization/adaptive delivery	7.8%
7. Coaching/mentoring	7.2%
8. Showing value	6.7%
9. Collaborative/social learning	6.5%
10. Micro learning	5.8%
11. Performance support	5.4%
12. Learning experience platforms	3.9%
13. Virtual and augmented reality	3.1%
14. Mobile delivery	2.4%
15. Other	1.3%
16. The Metaverse	1.2%
n = 276	

| GSS 2023 Brazil	
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3. Learning analytics	9.3%
4. Micro learning	9.3%
5. Reskilling/upskilling	9.2%
6. Skills-based talent management	8.1%
7. Learning experience platforms	8.1%
8. Consulting more deeply with the business	6.1%
9. Artificial intelligence	5.5%
10. Coaching/mentoring	5.0%
11. The Metaverse	3.8%
12. Showing value	3.8%
13. Performance support	3.1%
14. Virtual and augmented reality	1.6%
15. Mobile delivery	1.6%
16. Other	0.9%
n = 251	

Brazil and the past: Collaborative/social learning

GSS 2022 Brazil	
1. Collaborative/social learning	13.6%
2. Learning experience platforms	11.7%
3. Reskilling/upskilling	11.3%
4. Learning analytics	8.9%
5. Skills-based talent management	8.4%
6. Personalization/adaptive delivery	6.5%
7. Micro learning	6.5%
8. Curation	5.8%
9. Coaching/mentoring	5.6%
10. Artificial intelligence	4.8%
11. Consulting more deeply with the business	4.5%
12. Performance support	3.7%
13. Showing value	3.5%
14. Virtual and augmented reality	3.0%
15. Mobile delivery	1.9%
16. Other	0.2%
n = 164	

GSS 2023 Brazil	
1. Collaborative/social learning	13.9%
2. Personalization/adaptive delivery	10.5%
3. Learning analytics	9.3%
4. Micro learning	9.3%
5. Reskilling/upskilling	9.2%
6. Skills-based talent management	8.1%
7. Learning experience platforms	8.1%
8. Consulting more deeply with the business	6.1%
9. Artificial intelligence	5.5%
10. Coaching/mentoring	5.0%
11. The Metaverse	3.8%
12. Showing value	3.8%
13. Performance support	3.1%
14. Virtual and augmented reality	1.6%
15. Mobile delivery	1.6%
16. Other	0.9%
n = 251	

Brazil and the world: Collaborative/social learning

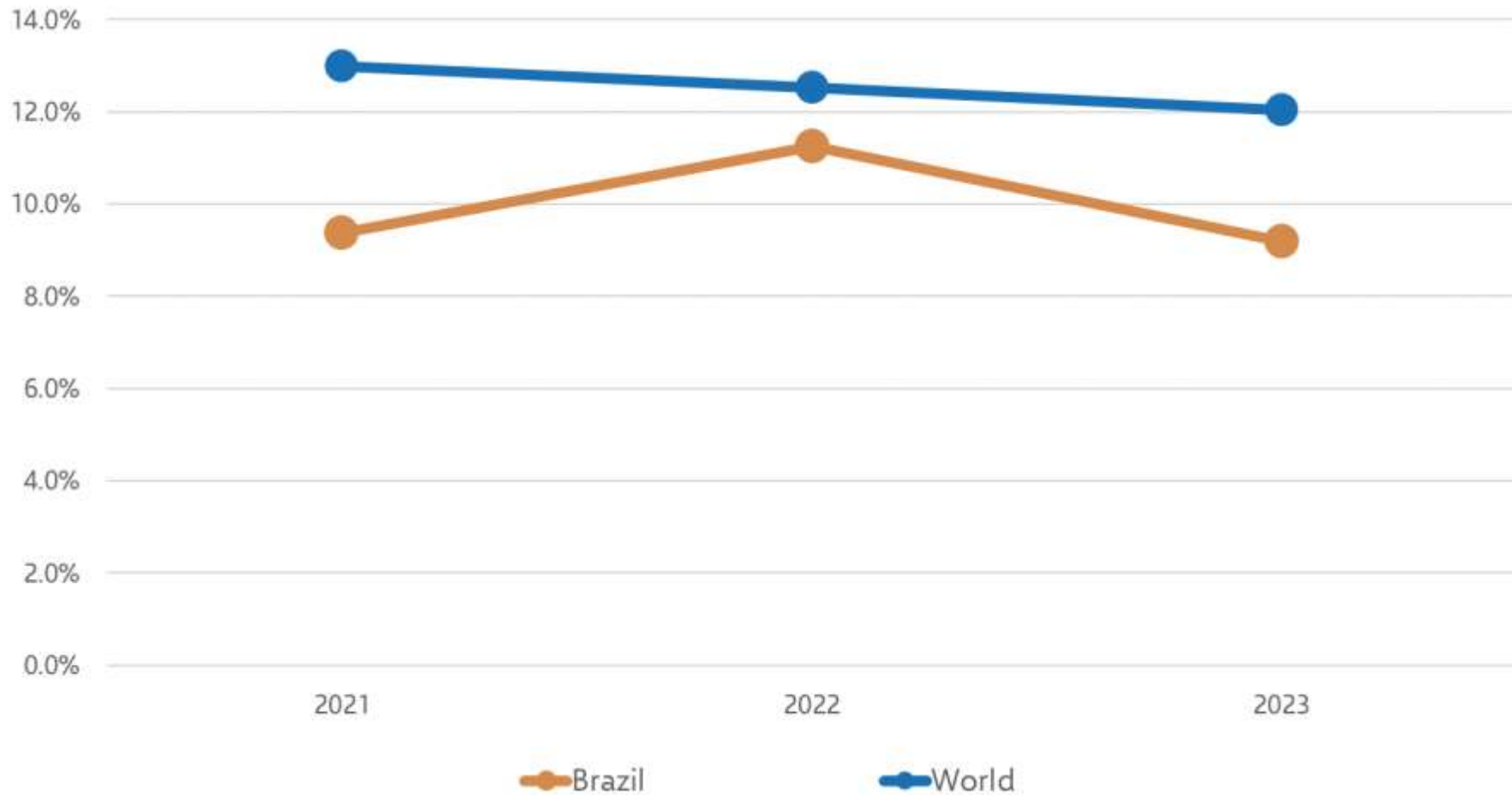# Brazil and the USA: Collaborative/social learning
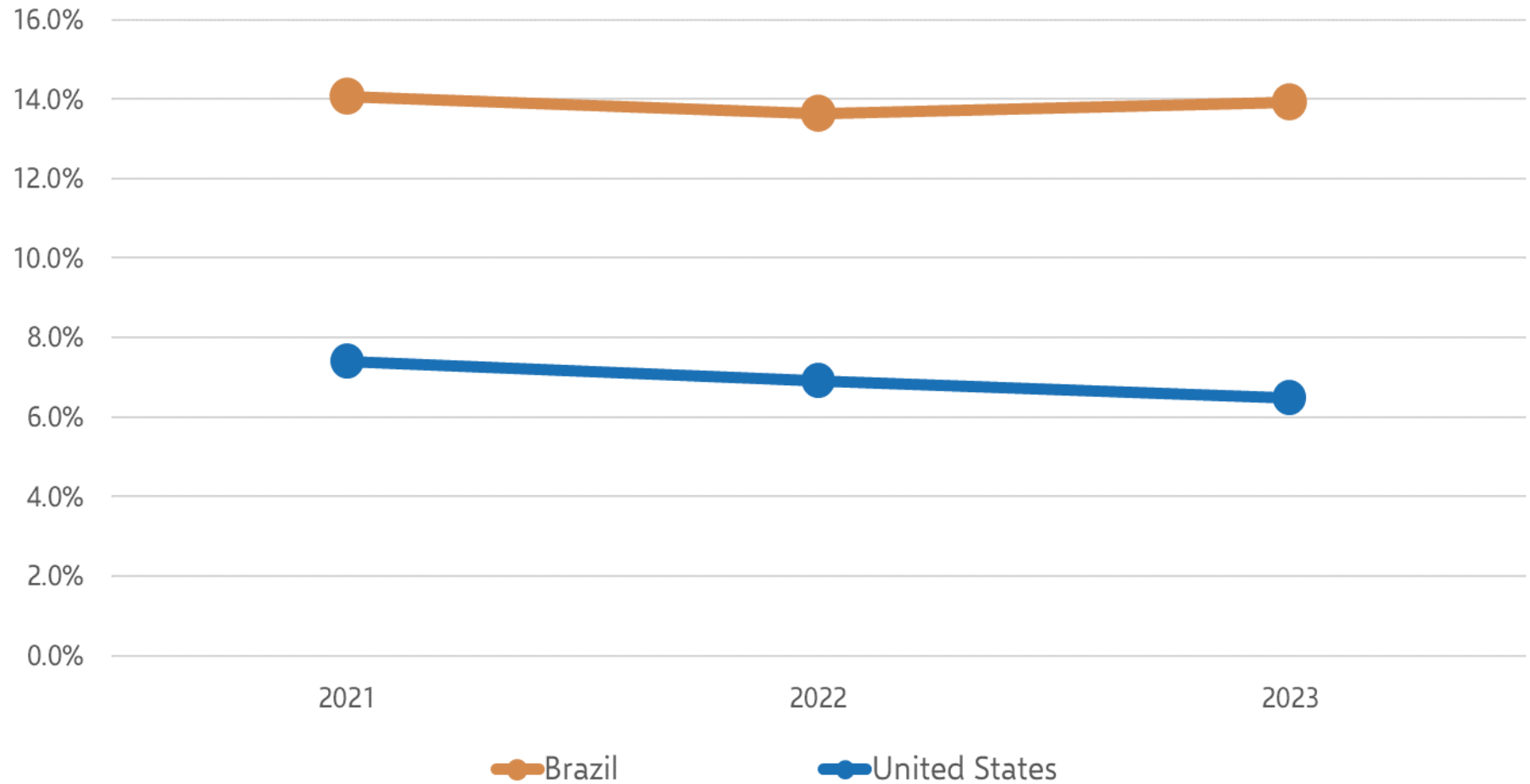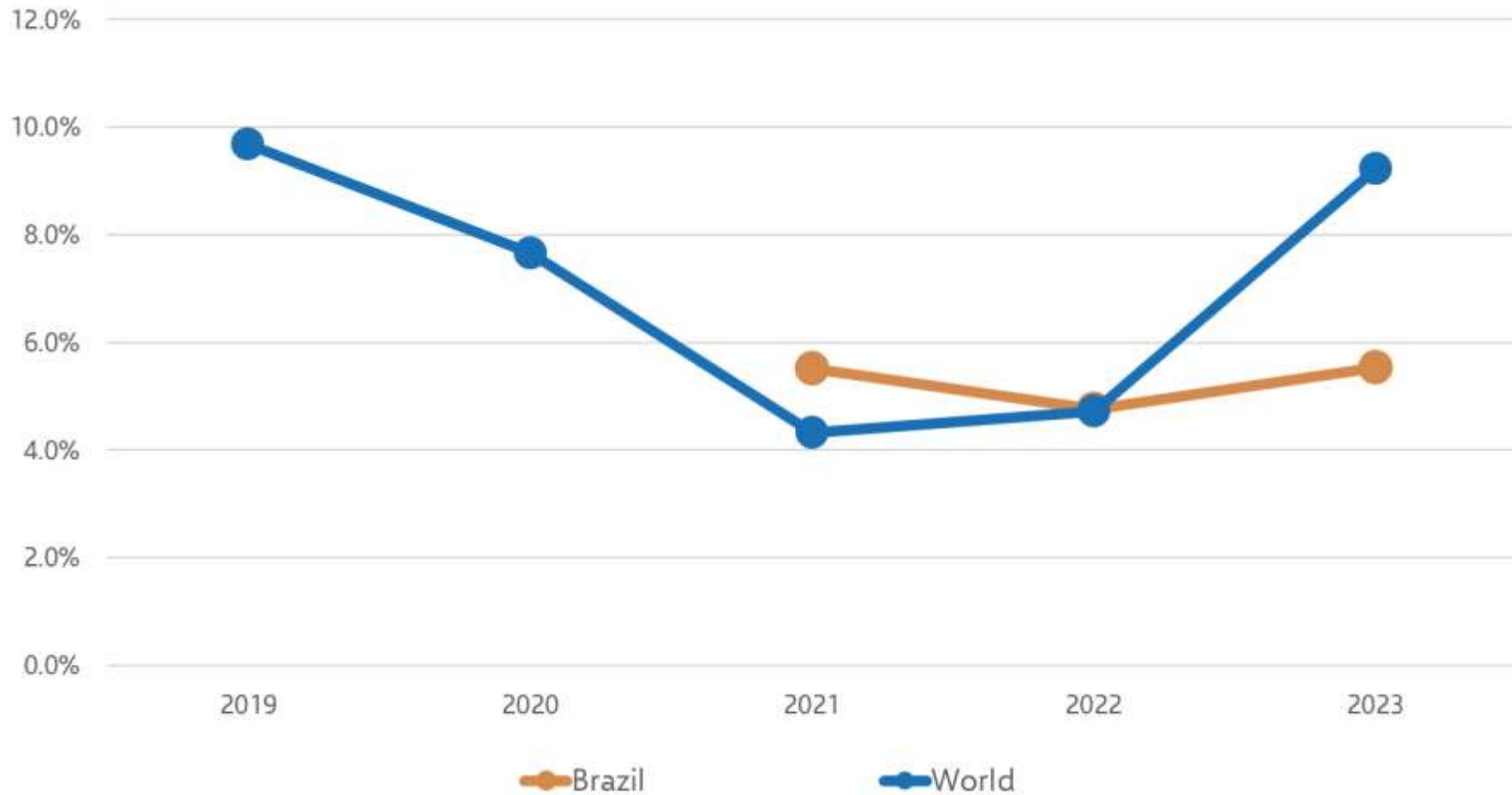
5
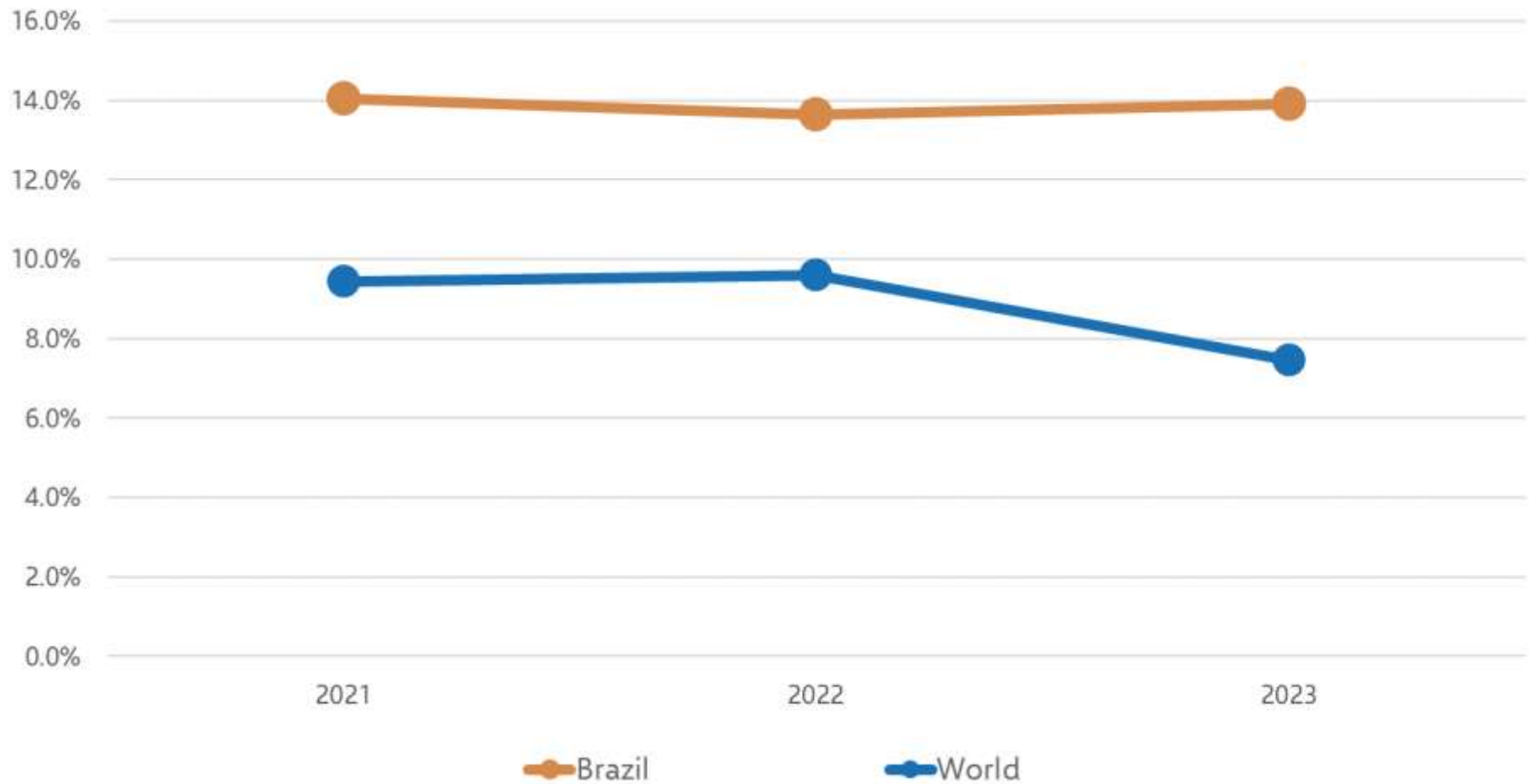
Conclusions

Brazil and the world: Re- and up-skilling

Brazil and the world: Artificial intelligence

Brazil and the world: Collaborative/social learning