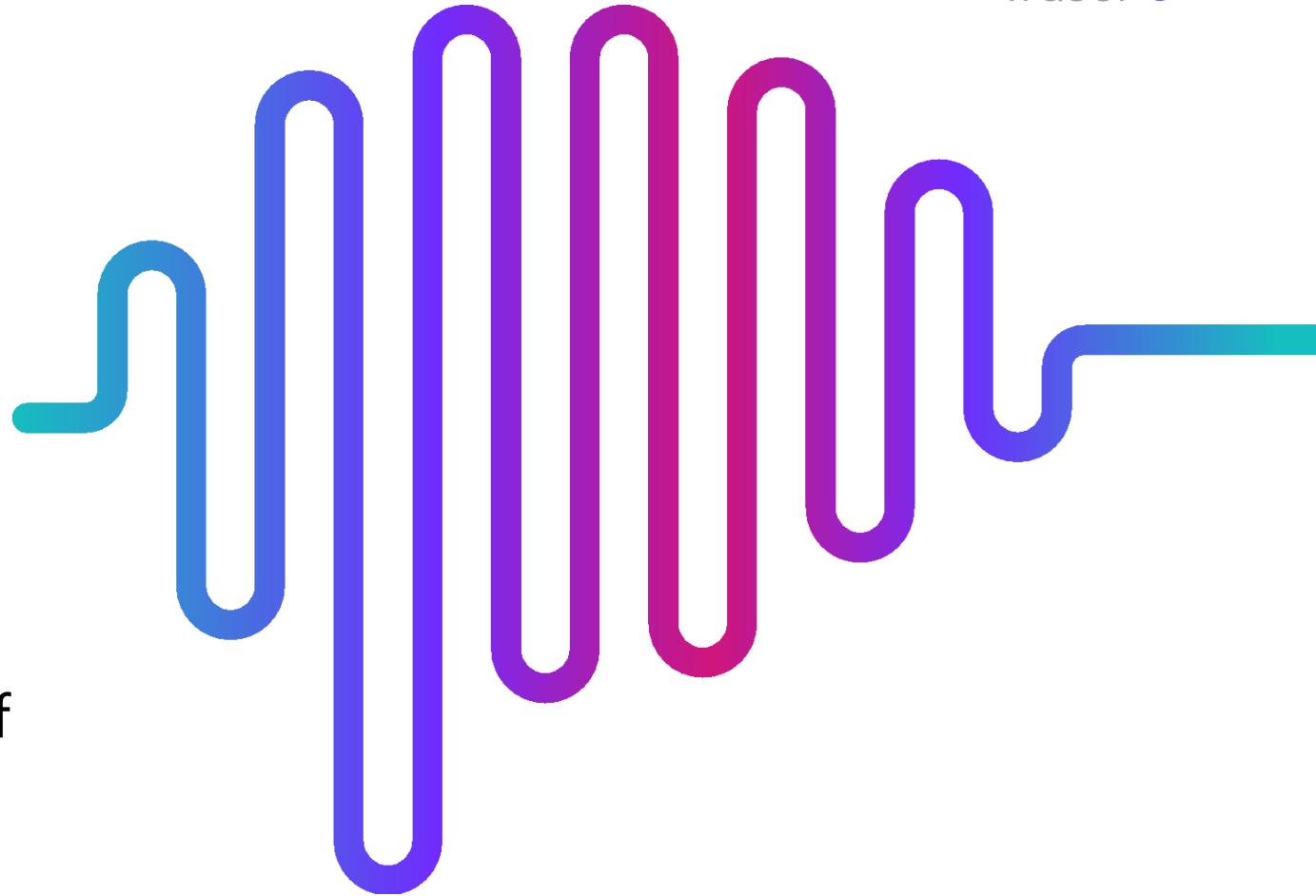


Learning & Development Impact Survey 2024

Benchmarking the changing role of
L&D in achieving business success





Introduction

The 2020s have been a time of ongoing and evolving disruption for L&D and HR. In the last few years, we've seen changed working structures as well as in-demand skills, learning cultures and delivery norms for the long term. But while pandemic worries have very much receded, the paradigm that learning must operate and deliver in, expectations of what (and on what agendas) it must deliver, how it engages and aligns with both learners and what capabilities it provides is still very much evolving. With economic uncertainty, ongoing talent, skills and learner concerns, the meteoric rise of AI, and debates over the best structures of working to drive changes in business and learning, L&D must step up once more as organisations look to the function to deliver in a continuously changing world.

It means the pressure is on for L&D. The function must deepen and update its approach to organisational and learner partnership. It must adapt to changing learner paradigms, showing new ways to communicate both its offering and worth to secure financial, leadership and employee buy-in on a changeable operational landscape. While many L&D practitioners would want more resources at their disposal, this hasn't stopped a significant number from progressing to adopt the latest methods of learning delivery, curation and personalisation. With many 2024 learning challenges, drivers and demands an evolution, rather than revolution, from 2023, functions are building on both know-how and confidence to deliver again, creating value for all stakeholders. While the coming 12 months ask pressing questions of L&D, the function should be confident in its agility, adaptability and ability. It has stepped up before. It can do so once more.

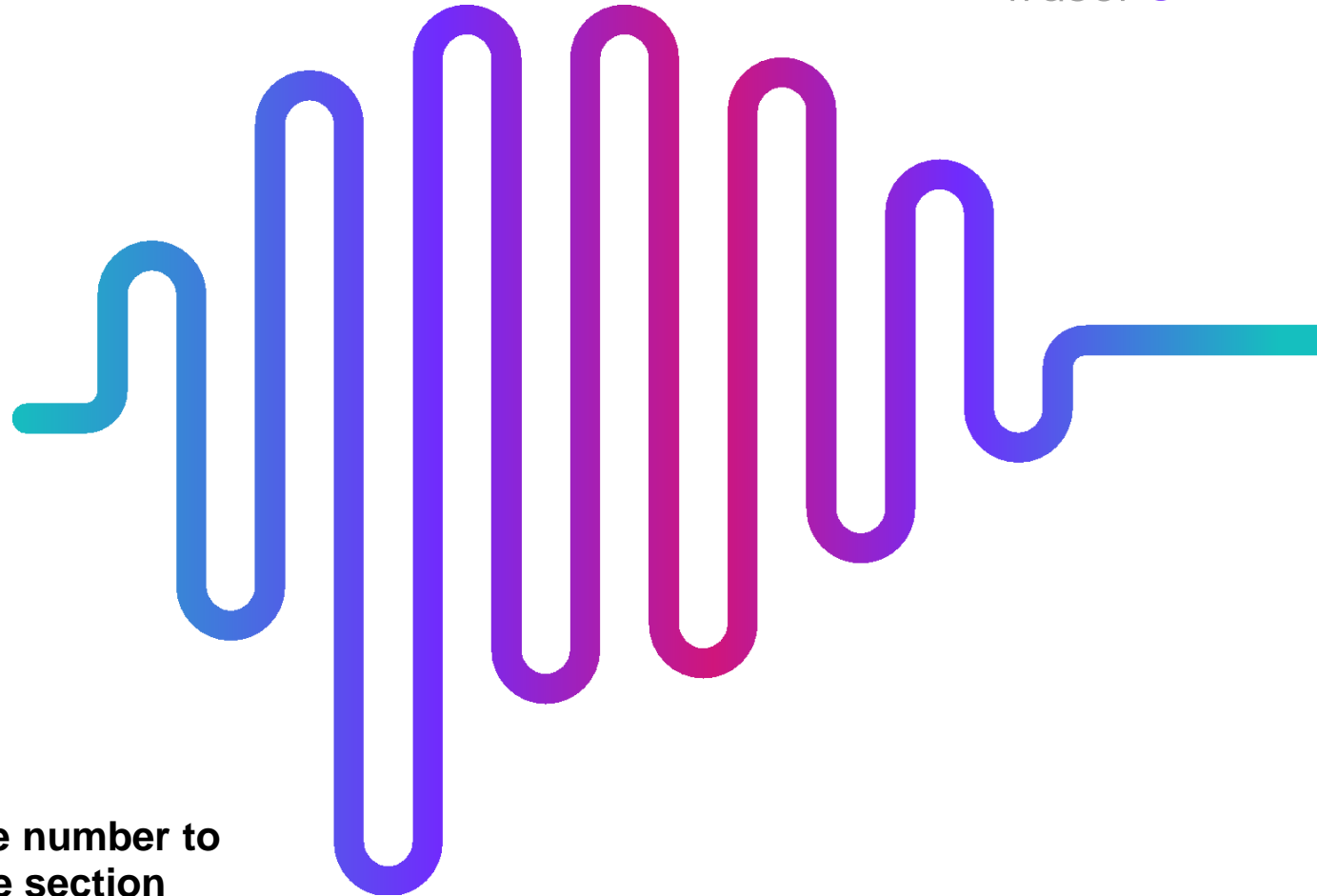


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SECTION 01

About our research

In our 2024 L&D Impact Survey we asked 766 L&D, HR, and talent professionals across the UK and North America from a wide range of sectors and organisation sizes about the latest changes in the learning and development landscape.



“ Establishing a culture that encourages learning and knowledge sharing is fundamental ”



UK

(with HR Grapevine)

398 respondents



North America

(with Training Industry)

368 respondents

Understanding L&D in 2024

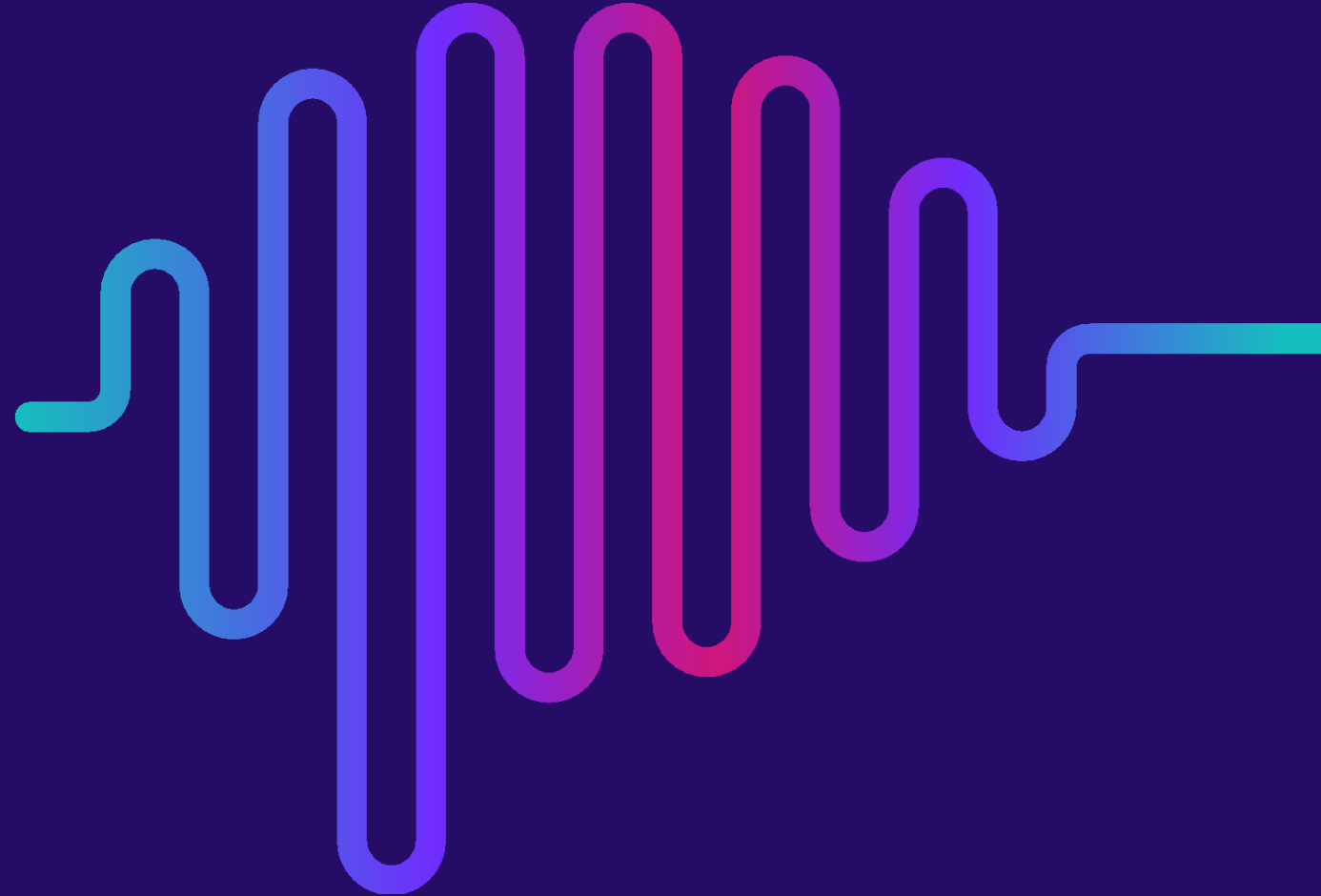
We asked respondents about the changing business agenda, how this impacted both the drivers and delivery of learning and the evolving nature of skills/capabilities. To understand this in-depth, questions focused on working structures, organisational and learning function challenges, budgetary realities, how learning impact was measured, and how innovations, including the impact of AI, influence the learning agenda. We also asked what skills and capabilities L&D is expected to deliver, the learning delivery methods they are using, and whether the function is effective in engaging with learners and stakeholders.



SECTION 02

Looking back at 2023

From delivering impactful development despite economic uncertainty to needing to better align with wider business strategies, the 2024 learning paradigm has many similarities with 2023.



Just 12 months ago hybrid learning was bedding in for the long term and practitioners were grappling with how changed working structures affected both learning agility and delivery.

As such, demand for L&D to provide soft skills was top of the agenda. Elsewhere, ongoing business transformation, the need to deliver despite budget cuts, the need to get leadership buy-in, and learner engagement, meant strategically aligning with the business was also an L&D concern.

Positively, a functional understanding of how to adapt to these challenges was born out of our 2023 survey results. Respondents told us that better measurement, an agile learning culture, better communication, and better learning experiences were all important. This should boost those confronted with challenges in 2024 as L&D has delivered within testing conditions before.

Top 3 challenges facing L&D

2023

Time/resources

Budget

**Buy-in/
resistance**

2024

Budget

Time/resources

**Engagement &
buy-in**



All cited 2024 key challenges

ACCESSIBILITY
/TECHNOLOGY

WORKLOAD

HYBRID
/REMOTE WORKING
/LEARNING

BUY-IN
/RESISTANCE

CONFLICTING
BUSINESS
PRIORITIES

BUDGETS
/COSTS

CAPACITY
TIME
/RESOURCES

RECRUITMENT
/ONBOARDING
/RETENTION

CONTENT
FATIGUE

AI ADOPTION

ENGAGEMENT
/ATTENDANCE

STRATEGIC
ALIGNMENT



SECTION 03

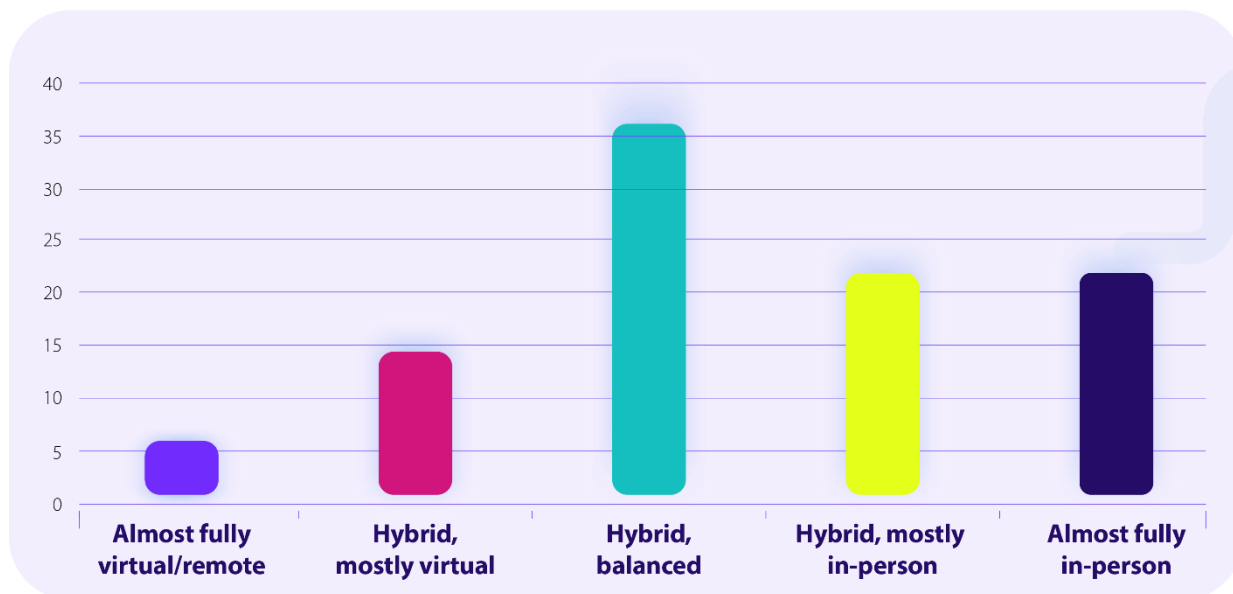
2024's evolving challenges

If 2023 was about meeting the long-term conditions of a pandemic-changed world, then 2024 is about adapting to continuous change to deliver on talent management, business and employee engagement, and fulfilment agendas.



2024's evolving challenges

How would you describe the current work situation for the majority of your organisation?



Despite uncertainty and challenges over finances — **6 in 10 respondents told us that the biggest challenges to their business was the economy** — changing working structures was considered the top business challenge overall with 61% of respondents stating this.

The majority of businesses still operate in a hybrid manner (80% hybrid in 2023 vs 72% hybrid in 2024). Yet headline-making tussles over office and remote work are being felt in a widespread way.



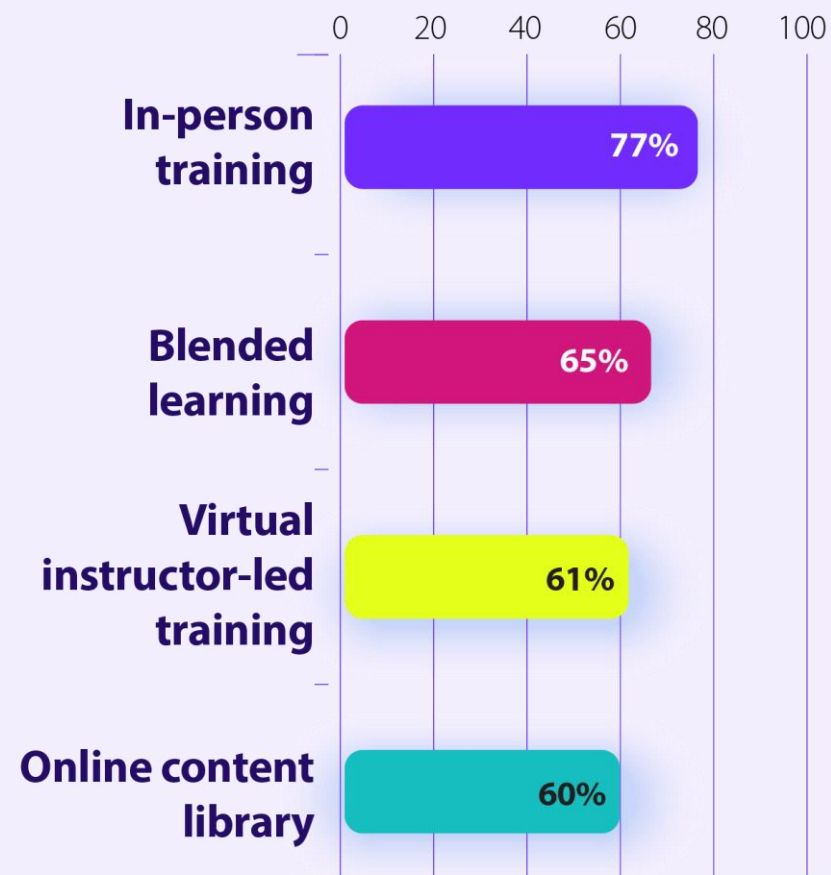
Learning delivery

Any change in working norms means learning must adapt. As such, delivery norms have been tweaked, if not overhauled. Positively, practitioners are doing so across the board. The UK has seen in-person learning delivery grow by 10% over 12 months.

For US enterprise firms — where 37% of respondents said work was almost fully in-person — they had the highest rates of in-person delivery with over 8 in 10 respondents saying they delivered in-person learning.

With hybrid working still the main approach, there must be the right blend of content, learning technology and services to do this successfully.

Which learning approaches do you currently use in your organisation?



SECTION 04

Adaptable L&D

While many respondents' top challenges are stated as the same in 2023, the context that informs them will have evolved. This is best showcased by technological developments.



Which of these is driving your learning and development strategy?

With digital transformation an ongoing concern, it's telling that last year half of respondents wanted an improved LMS but now, over a third want more generative AI. A clear case of L&D understanding the changing nature of the challenges ahead.

With AI use expanding, needed skills changing and economic worries, expectations on L&D are high and this adaptability to, and understanding of, context is critical.

With two top drivers of the 2024 L&D strategy being the need to fulfil and engage employees, and attract and retain them, alongside delivery for the business, the pressure is on.





Accelerating learning's impact

Alignment to business goals and better communication of learning, alongside better learning experiences, are seen as the key accelerators of learning impact in both the US and UK markets.

What do you think will accelerate the impact of your learning strategy on business success?

Alignment
to organisational goals

Communication
and engagement strategies

Overall experience
for learners



Looking to *drive engagement* & measure the impact of learning?

Symphony is Hemsley's approach to helping you maximise the usage and impact of your learning programmes through leveraging the right blend of promotional activities and data insights

Find out more



SECTION 05

Human Skills

It's not surprising that for the third year running 'soft/human skills development' is the innovation that survey respondents most wanted to see. There has even been year-on-year growth in the number of respondents, seeing this as a central focus.





Critical thinking, independent evaluation, and decision-making will be critical.



Respondents told us that leadership, change management skills, resilience, coaching and mentoring abilities, and adaptability are the skills they most need to deliver. But with digital transformation a core concern, and rising use of AI — more on that later on in the report — new for 2024 was the central importance of digital skills. This means L&D will have to get savvy, delivering multi-dimensional technical and soft skills to learners in a manner that engages them.

What future skills and behaviours are most critical for your business?

- Leadership & management skills
- Emotional intelligence
- Communication skills
- Adaptability & resilience
- Digital skills & technology
- Change management
- Coaching & mentoring



Looking to refresh your leadership development?

Discover more



The top 5 learning innovations L&D would you like to see in 2024

- 1 Human/soft skills development
- 2 Improved capability metrics for employee assessment
- 3 In-person training & development
- 4 Improved learning platforms
- 5 Adopting use of Generative AI for learning

“ Employees who are prepared mentally and possess emotional intelligence will be more competitive when facing various challenges and pressures. ”



SECTION 06

Budget & Buy-in

Economic uncertainty is a major concern across all respondent groups, even though the economic conditions are different in the US and UK.

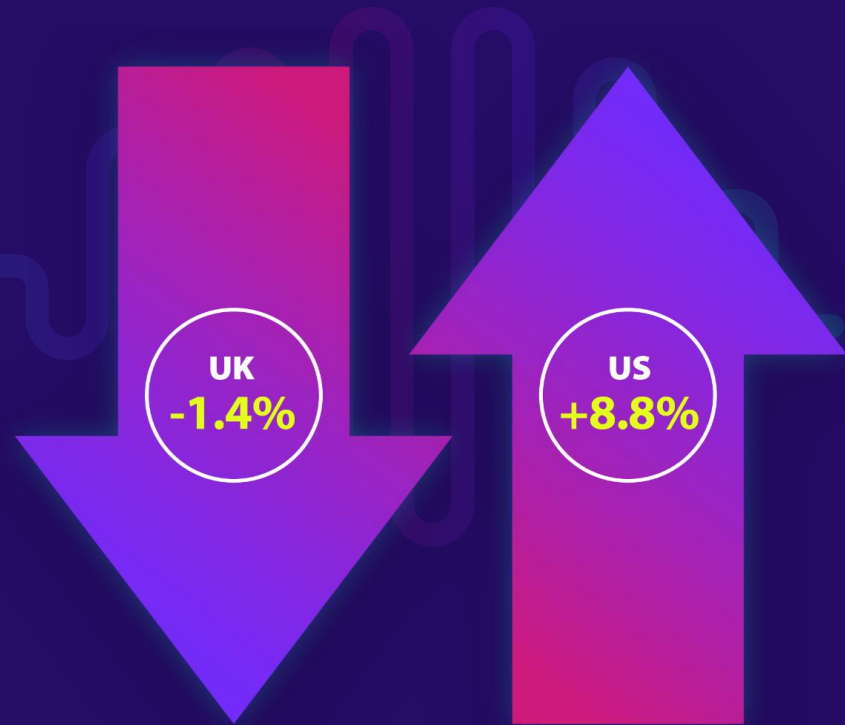


Budget & financing

In the US, GDP is growing by almost four times as in the UK, which is hit by recession. Indeed, respondents in UK mid-size firms feel most vulnerable: more than seven in 10 from this cohort said economic uncertainty was their major challenge compared to 6 in 10 overall.

This is no mere perception. UK practitioners expect learning budgets to be cut by an average of 1.4% over the coming year with budget coming out top as the major specific L&D challenge for 2024.

This is a long-term challenge: in 2023, 78% of UK L&D practitioners were pessimistic about financing. Yet, much like 12 months ago, UK practitioners are undeterred when it comes to accelerating the impact without expectation of financing, pointing to the fact that better organisational alignment, communication, and learning experiences will drive improvement ahead of the need for investment.



Please estimate the likely change in your organisation's training budget for 2024.



[A major challenge is] lack of L&D budget and pressure to deliver more with fewer people.



US Budgets

This isn't to say winning more budget isn't a positive. In the US, where learning budgets are expected to grow by 8.8% overall, there is a connection between those getting the most budget increases and forward-looking digital transformation.

Respondents at US mid-size firms, who had the highest predicted budgetary increases at 9.2%, were more like to want improved platforms, more virtual reality, and were using generative AI with a wider variety.

Interestingly, they also were most likely to measure the business impact of learning. Always useful when making the case for investment in learning initiatives and technology.

Noticeably, time and resource constraints, often linked to budget, are also an across-the-board concern. One respondent even told us:

"Always too many ideas and not enough time to deliver on them all"

Taken in the context of constant transformation, this only heightens the value of quick-to-deploy solutions, and learning which users can self-direct.



SECTION 07

Impact of measurement

Unsurprisingly, effective measurement is a critical step in obtaining leadership buy-in and showing the worth of L&D. Fortunately, respondents understand this with 95% stating measurement was at least partially important (a rise of five per cent year-on-year).



Impact of measurement



There is also a clear correlation between those who have budgetary bullishness and business-centric measurement. In North America, **37% of respondents measure the return on investment** and **45% measure the business impact**; there, the budgetary outlook is much stronger.

While macroeconomic conditions play a role here, this measurement and budgetary foundation does appear to be freeing them up to be future-looking with learner engagement, wellbeing and next steps. Key strategic steps towards delivery on one of 2024's top challenges: **engagement**.

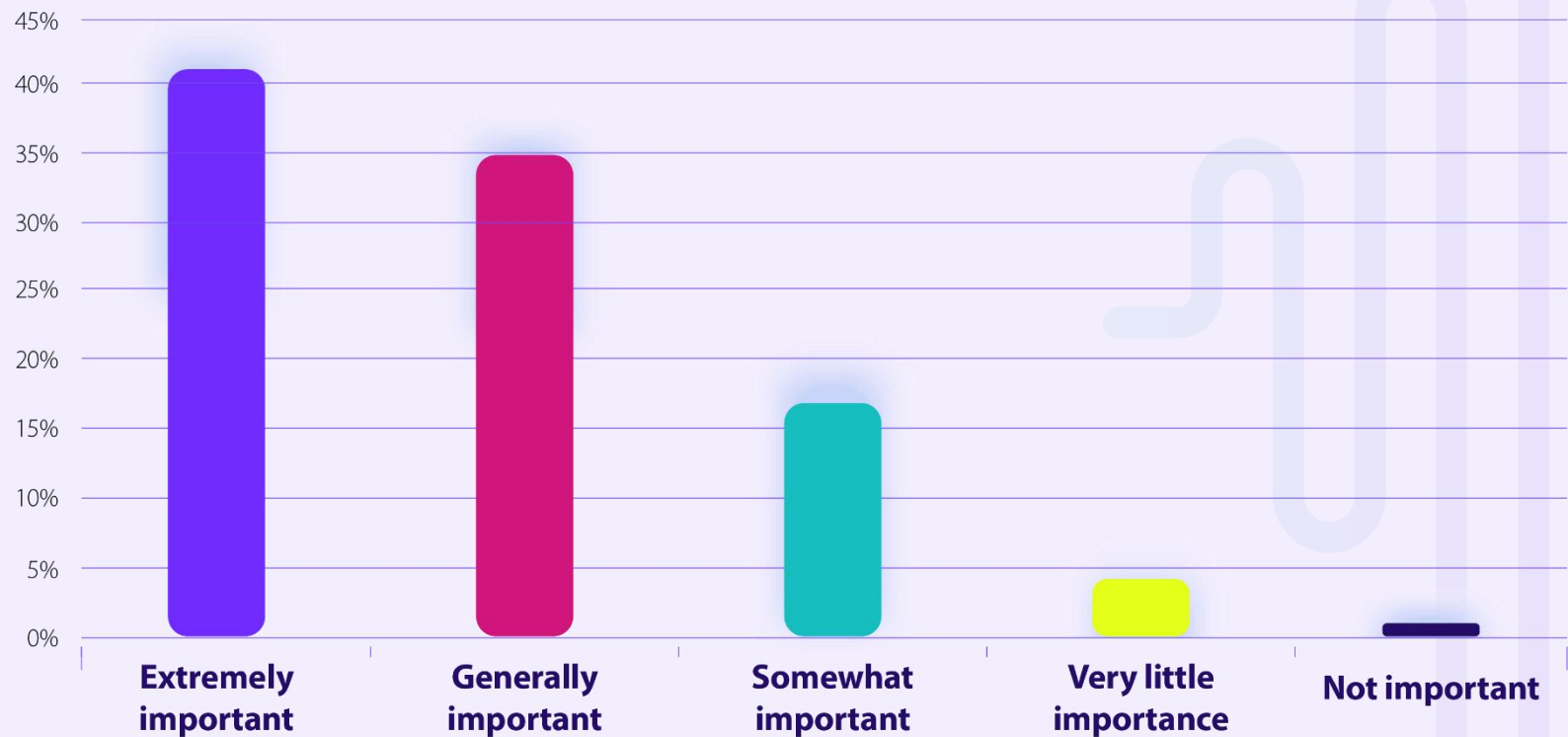


In the UK, where only **14% measure the business impact**, there is more budgetary pessimism, less usage of next-generation learning technology, and more concern about learner buy-in. That said, it is clear that the vast majority of respondents understand the importance of learning measurement. Indeed, over half of respondents want to see improved metrics as a 2024 innovation within the function.

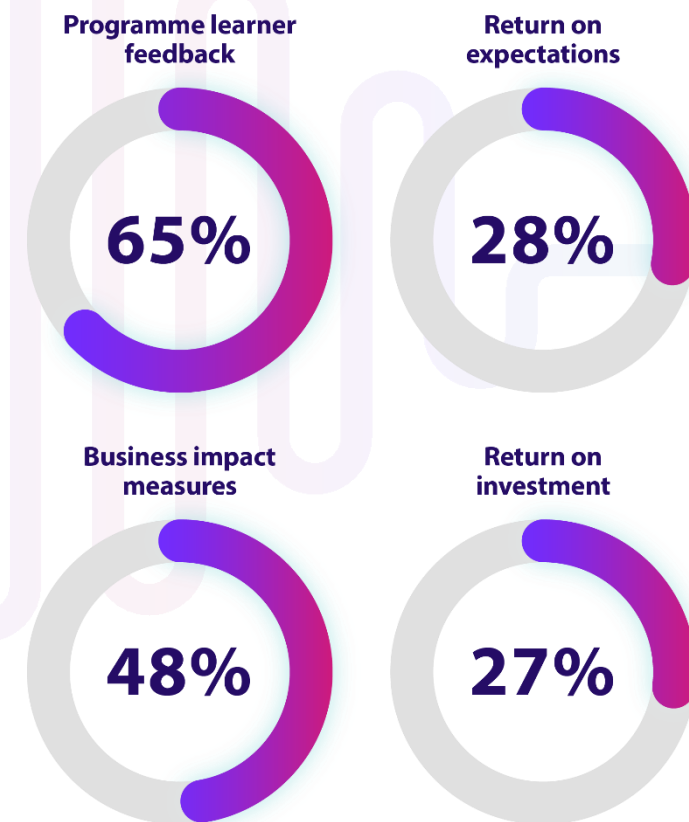
Doing so effectively will be critical in unlocking, at the very least supporting, learning which can deliver on talent and business aims.



Is learning measurement important in your business?



How do you currently measure the impact of learning provision in your organisation?



SECTION 08

Engaging employees & evolving challenges

Alongside delivering on the talent agenda, engaging and fulfilling employees has also grown in importance from 2023 to 2024. These two drivers of learning are, of course, linked, and functions that deliver successfully here will be adapting to where learners are and how they work.

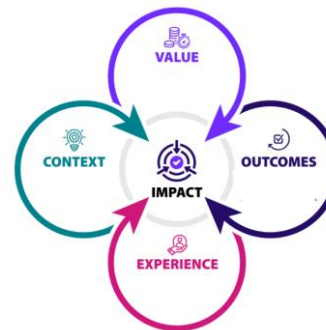




Talent agenda

With L&D clear that the talent agenda and employee satisfaction should be top of mind, it's positive that two of the top three things that the function wants to see are better learning experiences as well as improved engagement and communication strategies. Indeed, respondents shared clear examples of meeting employees where they are and looking to boost learning conditions.

At US enterprise firms, where 37% work fully in-person, 81% of L&D respondents are delivering in-person training as part of the learning experience. They're also moving past delivering using the easiest digital options, with paid-for virtual resources being used at a higher rate than free content.



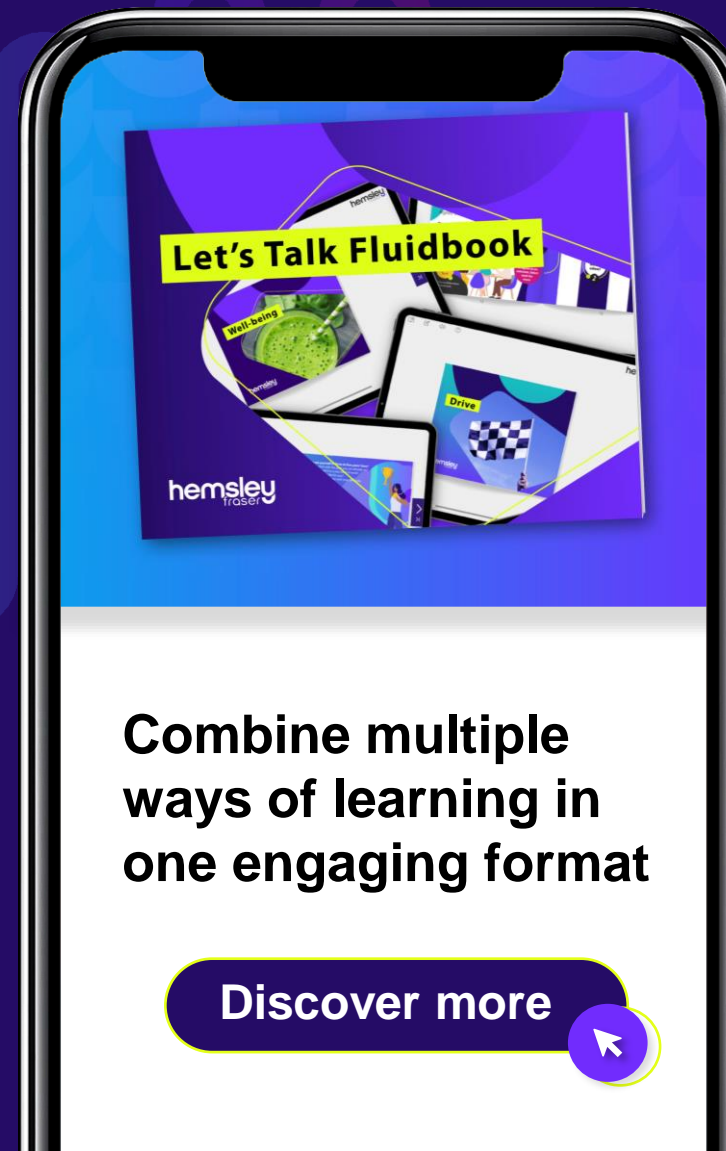
Read our short paper on how to consider the best learning format for your situation.

[Discover more](#)

Content that engages

Respondents also told us they are increasingly concerned that basic content and e-learning options are overused. These modalities are often standardised and uninspiring. It's important to remember the role content libraries can play, and the impact they can have when properly woven into a blended learning experience.

Some are already using AI to personalise content and curate individual learning journeys. Innovative practitioners also told us they're creating learning user groups, being more precise with channels they use to communicate learning, getting continuous feedback, and making quicker technical changes as well as guiding managers in a better manner. All critical to engagement, talent, and business agenda outcomes.



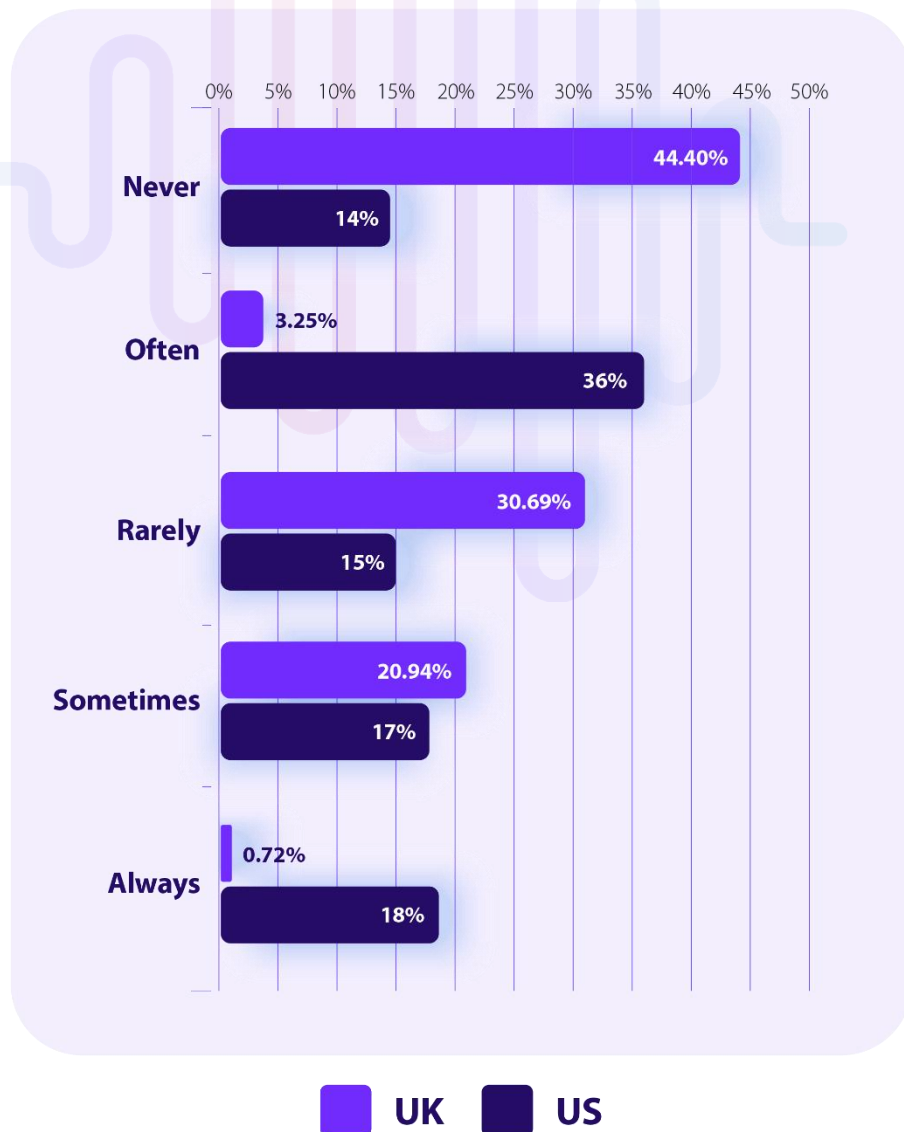
SECTION 09

AI & ongoing digital transformation

Generative AI has shaken up digital learning in 2024. Presently, 42% of respondents want to see AI in learning. A jump of 27% year-on-year.



Are you using Generative AI for learning and development?

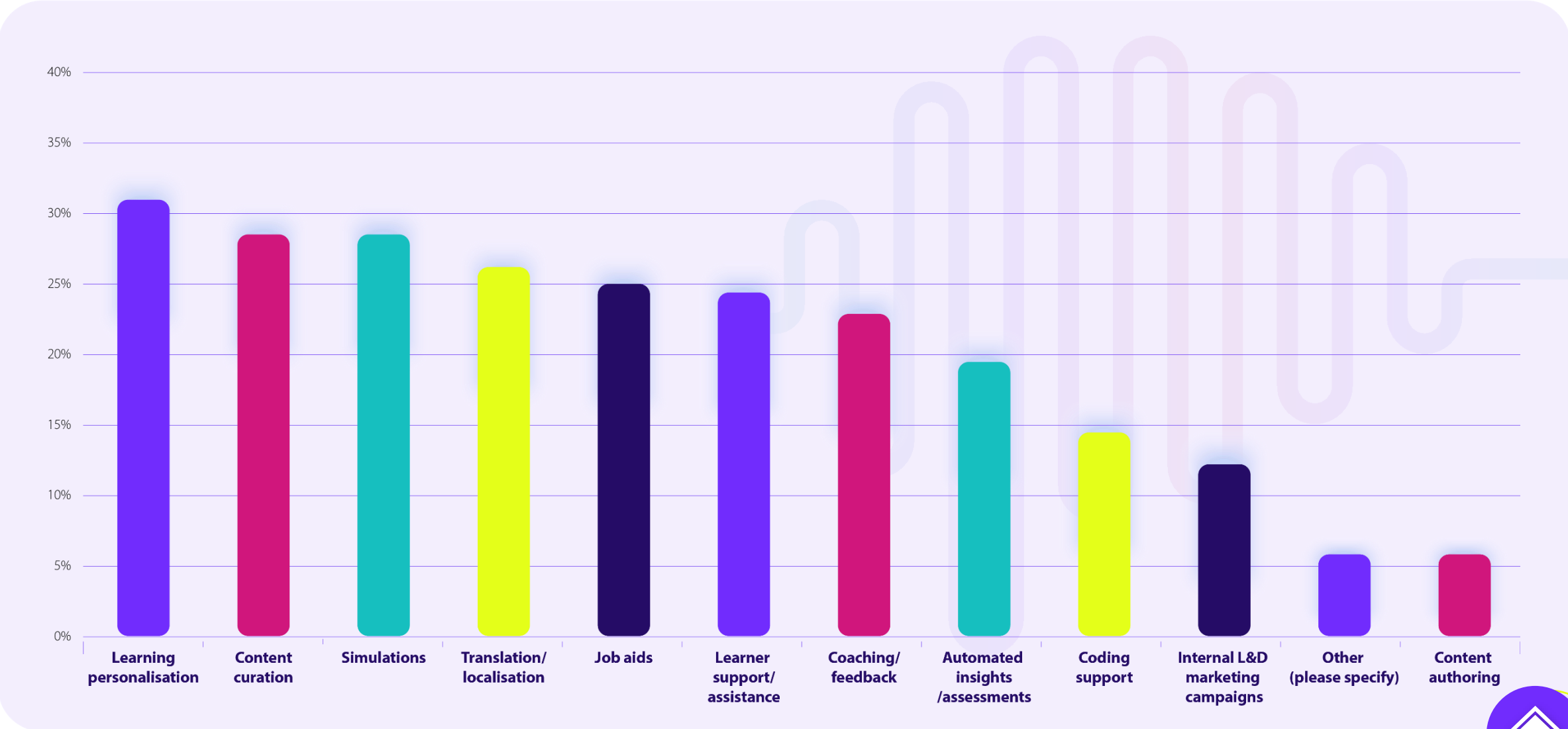


While still in the earlier stages of growth in the UK (the findings suggest that in the UK 44% are currently not using Gen AI), interest for Generative AI now outstrips that for mainstream learning technology solutions. In the US AI has had even more of a transformative effect. 36% of respondents in the US use it often.

For US mid-size firms, 65% use generative AI often or always in learning. Backed by budget and business-linked measurements, they also use AI in the most varied manner: from translating learning, to localising it, to creating simulations and helping with coding. Using AI to help improve the learning experience and personalise it. Both of these speak to the talent and engagement challenges L&D is expected to deliver against.



What are you using generative AI for?



Gen AI & human skills

This isn't to say respondents expect AI to be a panacea. Our survey findings mirror LinkedIn's recent 2024 in-demand skills survey showing that as AI increases businesses will increasingly need soft skills. Survey respondents cited communication, leadership, emotional intelligence and critical thinking as the skills they expect to be most important.

Elsewhere, with worries about overwhelming learners with content and e-learning, and AI being most used to aid content creation and curation, there could be concerns that AI could overwhelm the learning experience. However, practitioners do see AI as more of an opportunity (35% want to see more innovation here in 2024) than a threat (25%) showing critical engagement in the technology and its uses.

With the rise of AI, what other human/soft skills are even more important in the next 12-24 months?

EMOTIONAL INTELLIGENCE **CRITICAL THINKING**
RESILIENCE **THINKING**
CREATIVITY **FEEDBACK** **COMMUNICATION**
PROBLEM SOLVING **SKILL**
COACHING **ADAPTABILITY**

“

Communication needs to go hand in hand with Generative AI as we need to retain our ability to manage on a people level while utilising the new technologies.

”





With the focus on AI taking the spotlight, it is clear that other digital and virtual delivery methods are now seen as standard. Many already have learning management systems and virtual classrooms in place. With digital transformation a top three L&D challenge, it shows the function cannot stand still and must always be looking at which technology can help it deliver efficiently, creatively and in a business-centric manner that engages the individual needs of all employees. With AI already being used to personalise, support, simulate, provide feedback and author content, it's something that learners and learning leaders can't ignore.

SECTION 10

Conclusion

L&D must continue to innovate and not stand still as challenges evolve... By interpreting data, communicating effectively with learners and the business, ensuring programmes engage talent and developing the soft/human skills needed to thrive in an increasingly AI-powered work environment.



On the face of it, 2024 has many of the same learning drivers and challenges as the previous 12 months. The economic, business and talent landscape is still in flux, highlighted by mixed learning budget expectations and demands on L&D to continue to deliver on talent and business agendas.

Functions must also contend with the rise of AI and the challenges presented by working structures, as well as the need to continue to deliver in-demand soft skills such as leadership, resilience and critical thinking, while ensuring good learner engagement. Which is essential for the organisation to reach its goals with the skilled talent it needs.

Where there are challenges — be it worries about using sticking plaster or outmoded delivery methods and unengaging digital delivery, overwhelming and disengaging learners, or simply about resources, budget and time or measuring effectively — L&D appears to know where to go next. It knows that learning must be communicated effectively, it must be engaging and use the appropriate delivery method (blending in-person and digital), must deliver the capabilities needed to navigate present challenges (including supplementing AI with the right soft skills or better digital capabilities), and be cost-effective and impactful.





There are also clear places where L&D functions are being innovative and forward-looking, measuring effectively, focusing on talent and employee fulfilment, and aligning to the business to deliver results. In fact, with concerns over the impact of AI as well as worker engagement, L&D can build on lessons from previous years and become the centre-piece of connectedness.

L&D teams know that they needn't go this alone. Some in the market are streaks ahead and partnering with industry experts, who can give the L&D function access to best-practice expertise, industry benchmarks and roadmaps, as well as the services to bring learning to life.

At Hemsley Fraser, we believe that using a blend of learning and development content, delivery, technology, and learning experience services – including metrics and communication – is what's needed to deliver the best engagement and business-oriented outcomes.



www.hemsleyfraser.com/impact-2024

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