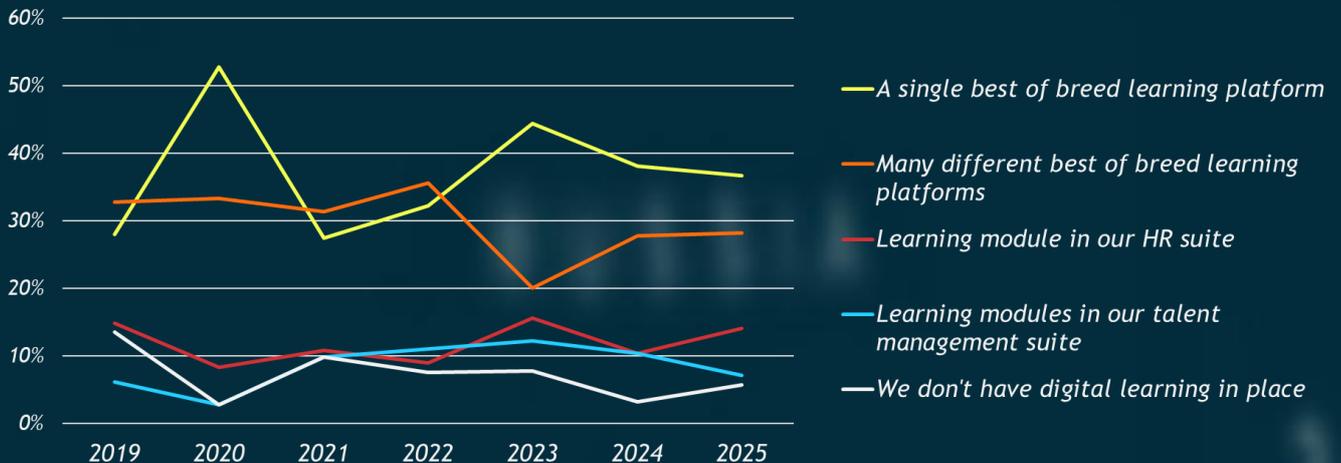# Digital Learning Realities 2025

Learning Technology Ecosystem Trends

Best of breed Learning Systems dominate a stagnant learning technology landscape

The investment of Cloud HR providers over the past decade doesn't seem to have made a significant impact on organisations' learning platform ecosystem. Only 12% of organisations are using the learning module in their HR or HCM solution. Specialist LMS and LXP solutions continue to win this segment of the HR solutions market and the biggest opportunity for providers and suppliers might lay in consolidating fragmented LMS and LXP systems stacks – as one in three admits to running multiple best of breed learning platforms. And overall, most learning teams, almost three in four, use a best of breed learning system to manage and support the learning experience.

How does learning in your organisation fit with the rest of your HR technology infrastructure?

- A single best of breed learning platform
- Many different best of breed learning platforms
- Learning module in our HR suite
- Learning modules in our talent management suite
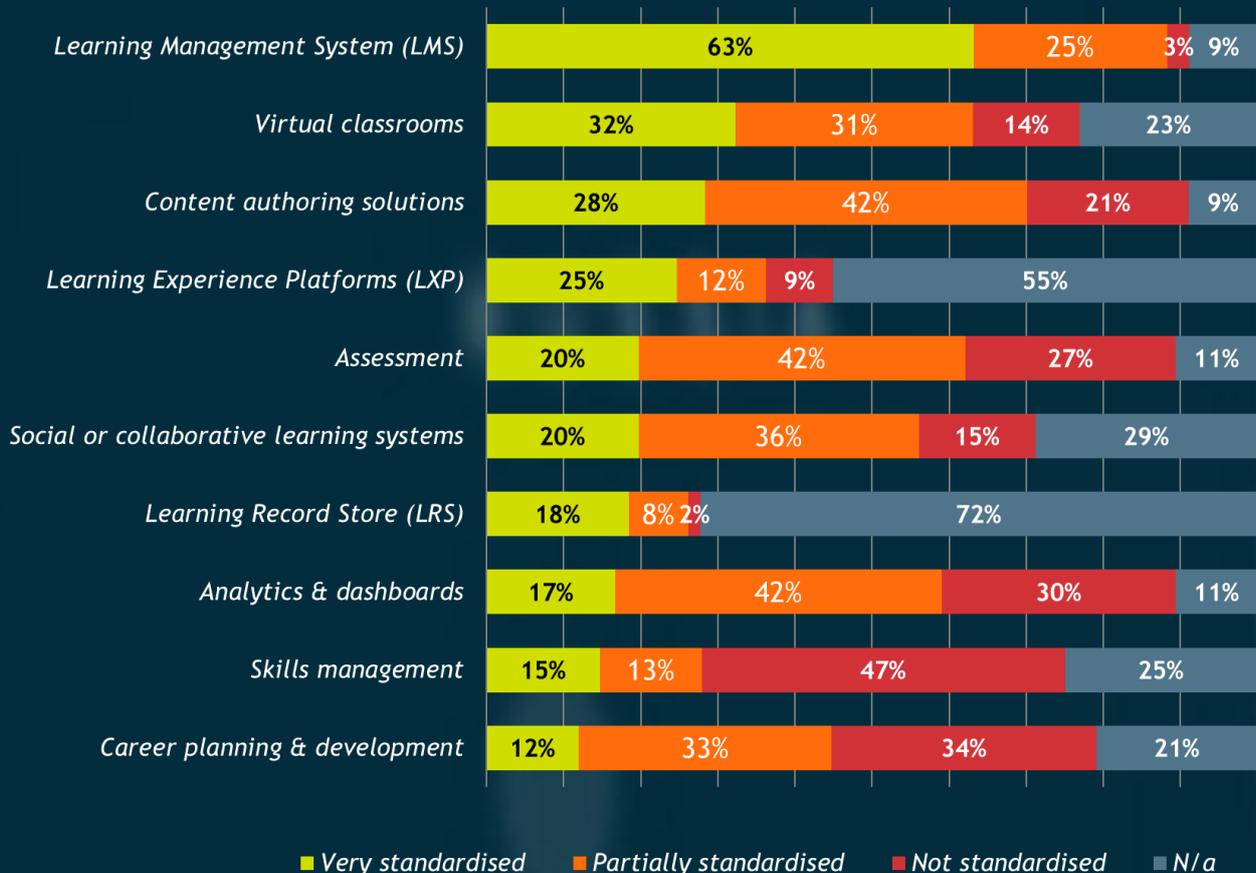- We don't have digital learning in place

There is little in HRIS roadmaps to threaten the dominance 'Best of Breed' LMSs or LXPs

The inability of HR Suites to satisfy L&D teams' expectations with learning modules in their HR platform continues to be a major trend. And there is little in HRIS solutions' roadmaps to make us believe this will fundamentally change. The only catalyst for change is likely to be AI's ability to redefine the nature of the learning experience. But as we observed last year - HR solution providers have deployed very little learning innovation which would radically change the learning systems market and show little prospect of offering anything that could be seen as revolutionary. In fact, HRIS solutions users are twice as likely to report their solution is NOT FIT for the modern workforce than their best of breed learning system counterparts.

The lack of standardisation around skills management IS becoming the biggest flaw in learning teams' technology ecosystem

As skills and capability management becomes a strategic imperative for many organisations, and as they begin to think about how they will transition to the future world of work, skills management continues to languish near the bottom of the solutions that are very standardised. For skills and capabilities to work, there needs to be consistency across the employee lifecycle and today too many teams risk disaster by not working to rationalise the skills and work ontology question. In future, as task-based organisations begin to become the underpinning concept of work, this may yet become a momentary and evolutionary problem – but if you are executing a skills-based organisation today or the near future – you risk plunging your organisation into constant confusion if you cannot provide continuity in your capability journeys.
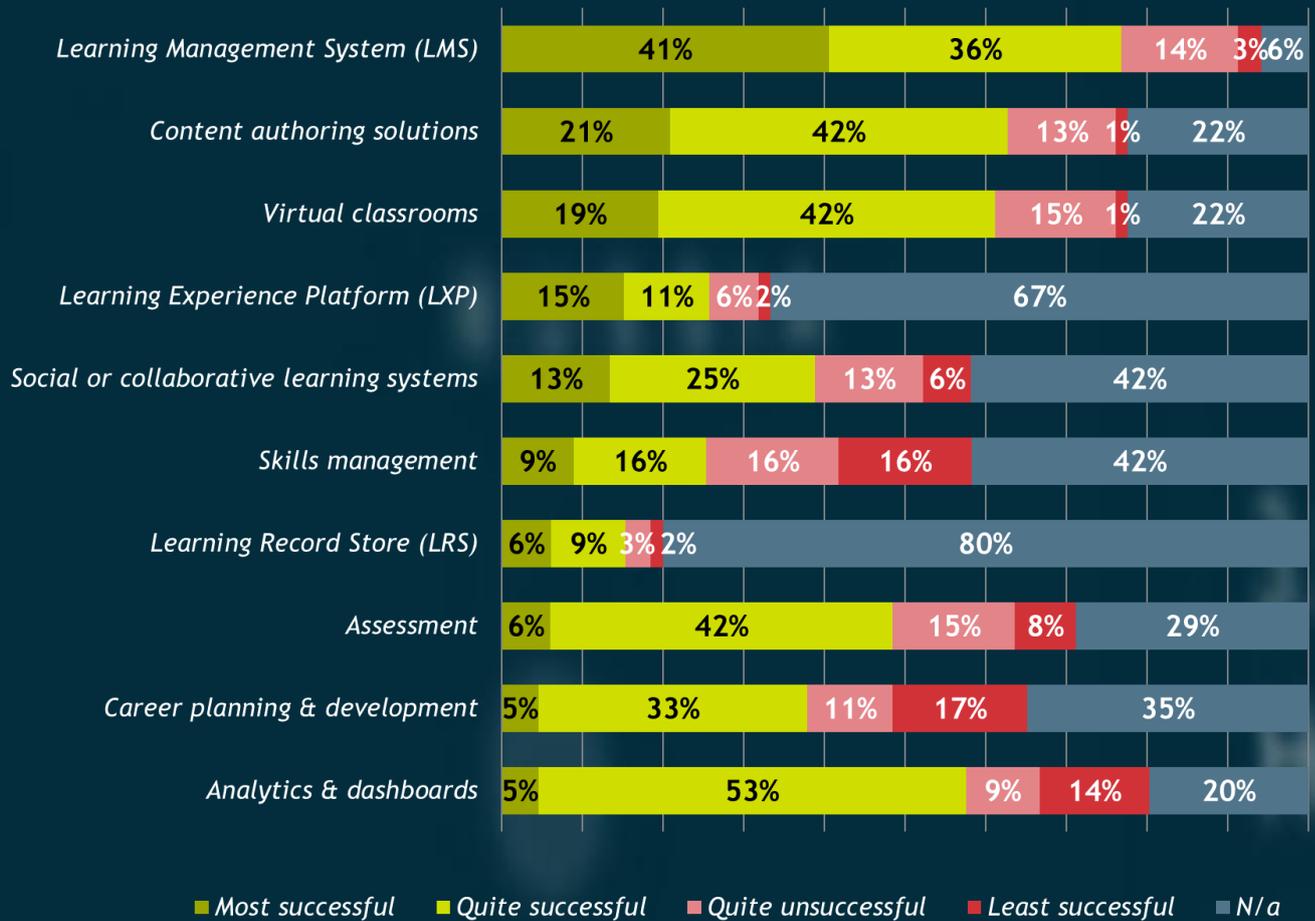
How standardised are the digital learning platforms across your organisation?

Platform	Very standardised	Partially standardised	Not standardised	N/a
Learning Management System (LMS)	63%	25%	3%	9%
Virtual classrooms	32%	31%	14%	23%
Content authoring solutions	28%	42%	21%	9%
Learning Experience Platforms (LXP)	25%	12%	9%	55%
Assessment	20%	42%	27%	11%
Social or collaborative learning systems	20%	36%	15%	29%
Learning Record Store (LRS)	18%	8%	2%	72%
Analytics & dashboards	17%	42%	30%	11%
Skills management	15%	13%	47%	25%
Career planning & development	12%	33%	34%	21%

■ Very standardised ■ Partially standardised ■ Not standardised ■ N/a

An inability to build an effective ecosystem for skills, career development and future workforce contributes to L&D's identity as a transactional function

Learning teams are struggling with potentially their biggest opportunities. When it comes to creating business transformation less than one in four claim any success with skills and less two in five think they have been very successful at supporting career development. As a result, L&D teams risk marginalisation if they do not provide the people transformations at scale that makes their workforce fit for the future. Marry this with a systemic inability to report value and evidence impact, and learning teams are at risk of becoming more of a transactional function, when their organisations need them to be even more influential.
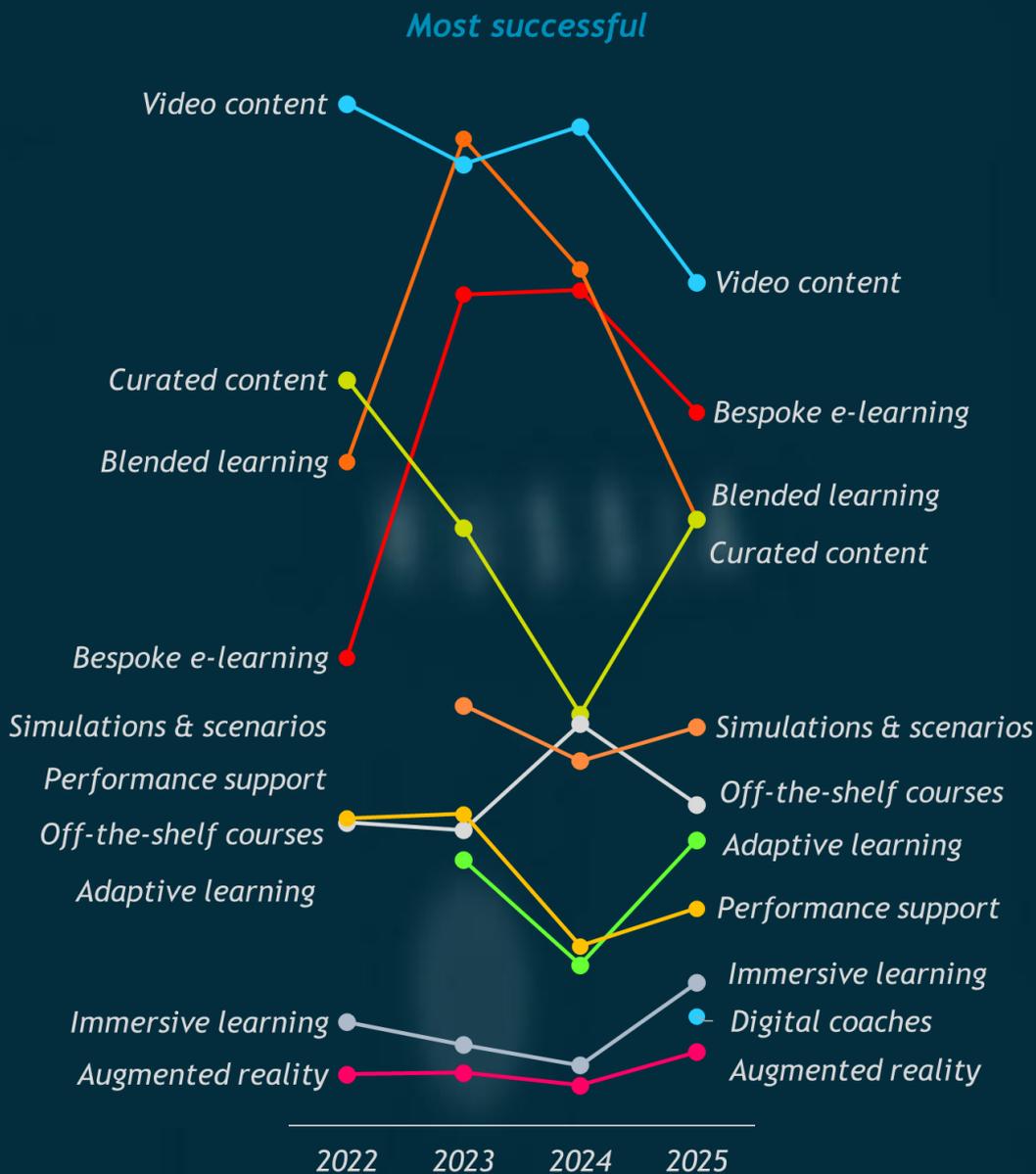
What learning platforms / solutions in your ecosystem have been the most successful in supporting your organisation over the past year?

Platform/Solution	Most successful	Quite successful	Quite unsuccessful	Least successful	N/a
Learning Management System (LMS)	41%	36%	14%	3%	6%
Content authoring solutions	21%	42%	13%	1%	22%
Virtual classrooms	19%	42%	15%	1%	22%
Learning Experience Platform (LXP)	15%	11%	6%	2%	67%
Social or collaborative learning systems	13%	25%	13%	6%	42%
Skills management	9%	16%	16%	16%	42%
Learning Record Store (LRS)	6%	9%	3%	2%	80%
Assessment	6%	42%	15%	8%	29%
Career planning & development	5%	33%	11%	17%	35%
Analytics & dashboards	5%	53%	9%	14%	20%

■ *Most successful* ■ *Quite successful* ■ *Quite unsuccessful* ■ *Least successful* ■ *N/a*

Video is seen as the most successful learning content, whilst digital AI coaches have yet to make an impact

Effective innovation with learning content has been slow, with most L&D teams rating traditional approaches as their most successful again this year. In fact, there has been no significant movement in the top four learning content formats for the past four years. Equally L&D teams' success with more progressive and engaging learning content remains at the fringe - with success limited to a few innovators.

What types of digital learning content in your ecosystem have been most successful in supporting your organisation during the past year?

Most successful

Video content

Curated content

Blended learning

Bespoke e-learning

Simulations & scenarios

Performance support

Off-the-shelf courses

Adaptive learning

Immersive learning

Augmented reality

Video content

Bespoke e-learning

Blended learning

Curated content

Simulations & scenarios

Off-the-shelf courses

Adaptive learning

Performance support

Immersive learning

Digital coaches

Augmented reality

2022   2023   2024   2025