

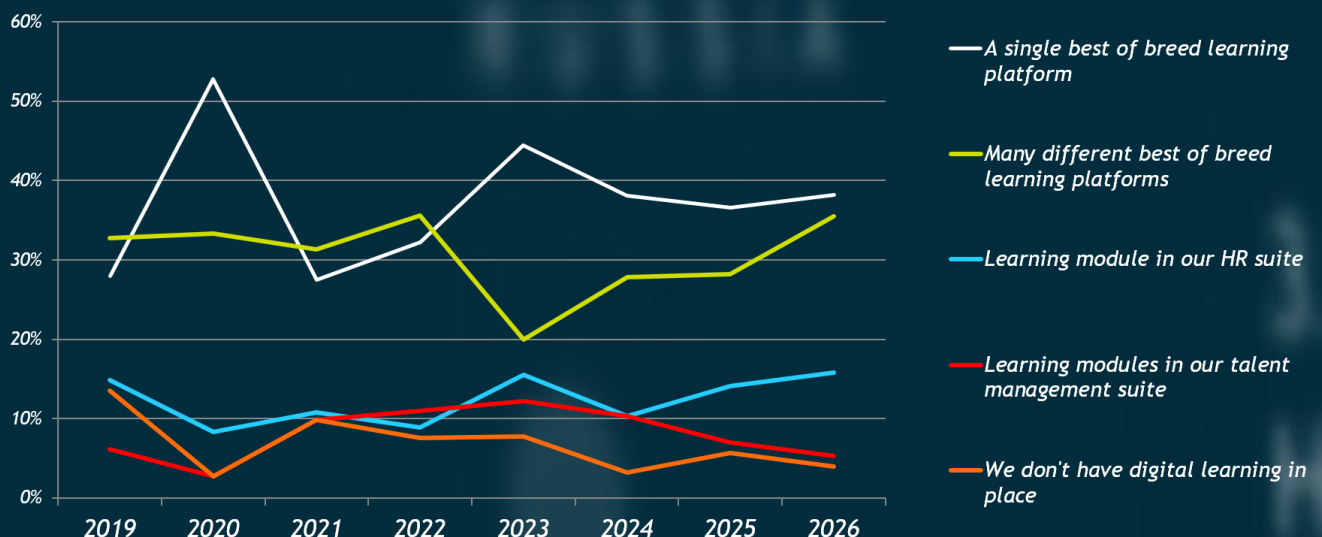
Digital Learning Realities 2026

The Modern Learning Technology Ecosystem

Best of breed learning platforms dominate the learning technology landscape and their influence is growing

Best of breed learning solutions continue to cement their grip on the learning technology market, and despite the pressures for solution consolidation there seems to be a growing momentum with specialist LMS and LXP solutions. Today almost 75% of learning teams are operating specialist learning platforms. And after a phase of consolidation, the range of best of breed solutions appears to be growing again - partly driven by the growth of digital learning solutions for frontline workers, but also the desire to broaden the learning experience into just-in-time learning and performance support, which increasingly incorporates AI-chatbot coaches.

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



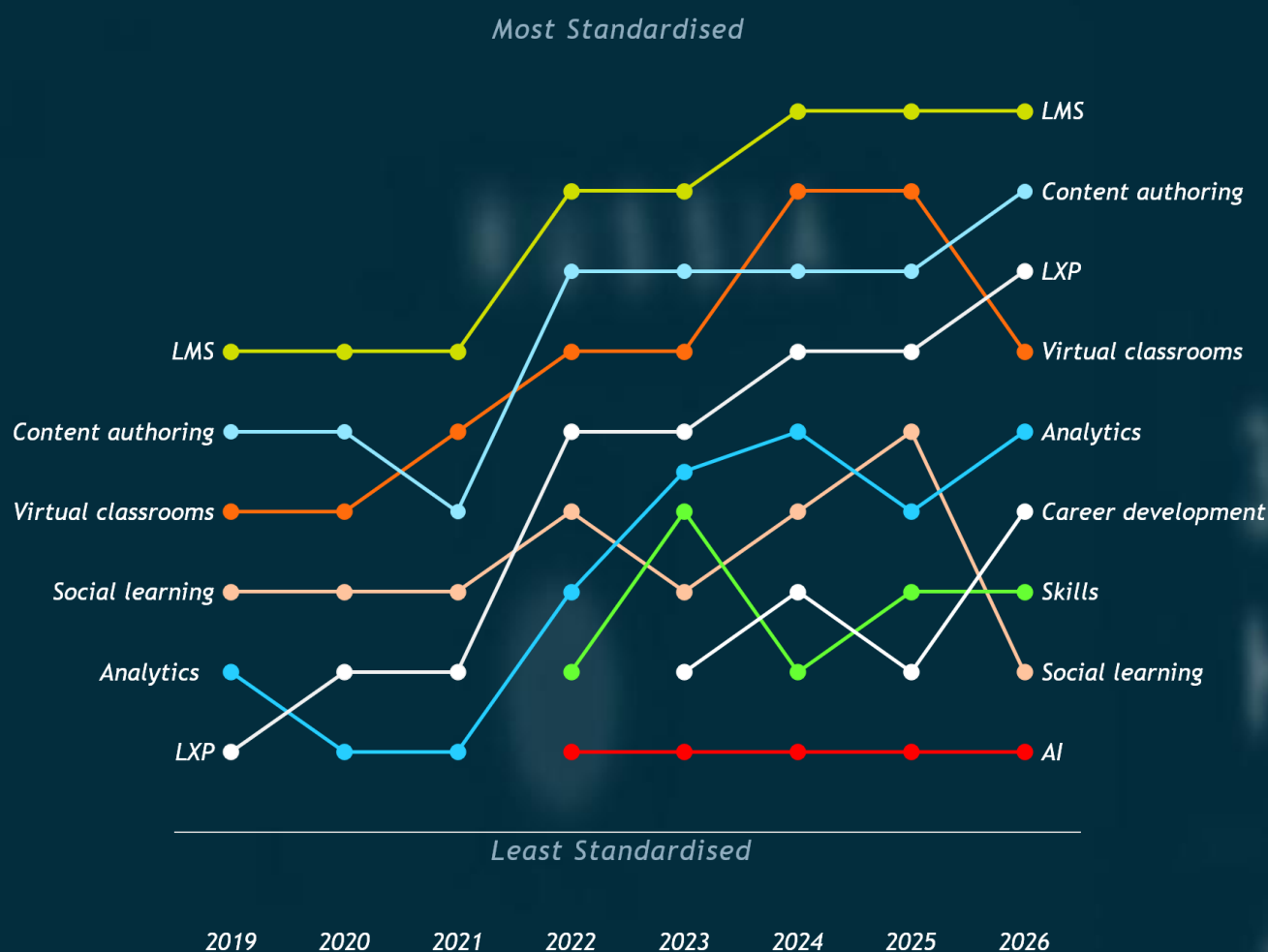
Can HRIS suites ever threaten the dominance of 'Best of Breed' LMSs or LXPs?

So, can HRIS solutions ever really challenge the dominance of best of breed LMS and LXPs? Today, that is only a very remote possibility. But, as we highlighted last year, as the nature of the learning experience begins to evolve because of AI, especially around skills, internal mobility, personalisation and a shift to the use of coach-bots, there is the potential for this status quo to change quickly. Microsoft's emerging learning Copilot and Workday's acquisition of Sana Labs could be seriously destabilising, not because they catch up on LMS and LXP functionality - but because they enable more intelligent, scalable, and effective ways to power learning than LMS and LXP solutions currently do.

Learning teams' strategic value is being marginalised by the lack of standardisation around skills, analytics and career development

With skills and capability management becoming an even greater strategic imperative for organisations, the fact that skills management continues to languish near the bottom of the stack of standardised leaning solutions should be a cause of serious concern. As we highlighted last year - to support the transition into the future of work there needs to be consistency in skills across the employee lifecycle. Too many learning teams risk marginalisation by failing to integrate skills coherently into their learning experiences. This is not only a matter for career development - but about accelerating the high-performance capabilities that are needed for future success.

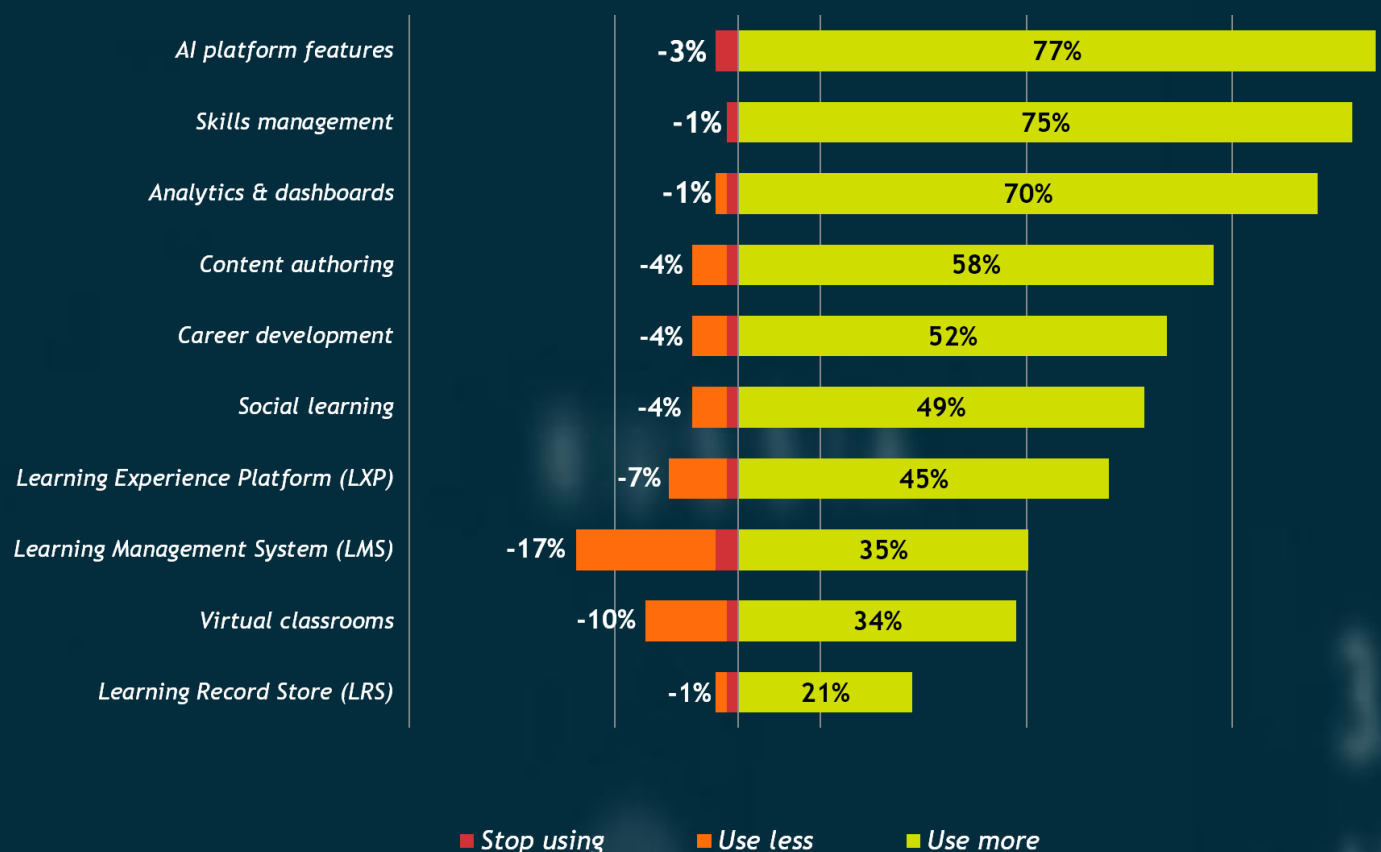
How standardised are the digital learning platforms across your organisation?



Demand for skills, analytics and AI is growing rapidly as learning teams look to address critical weaknesses in their learning ecosystem

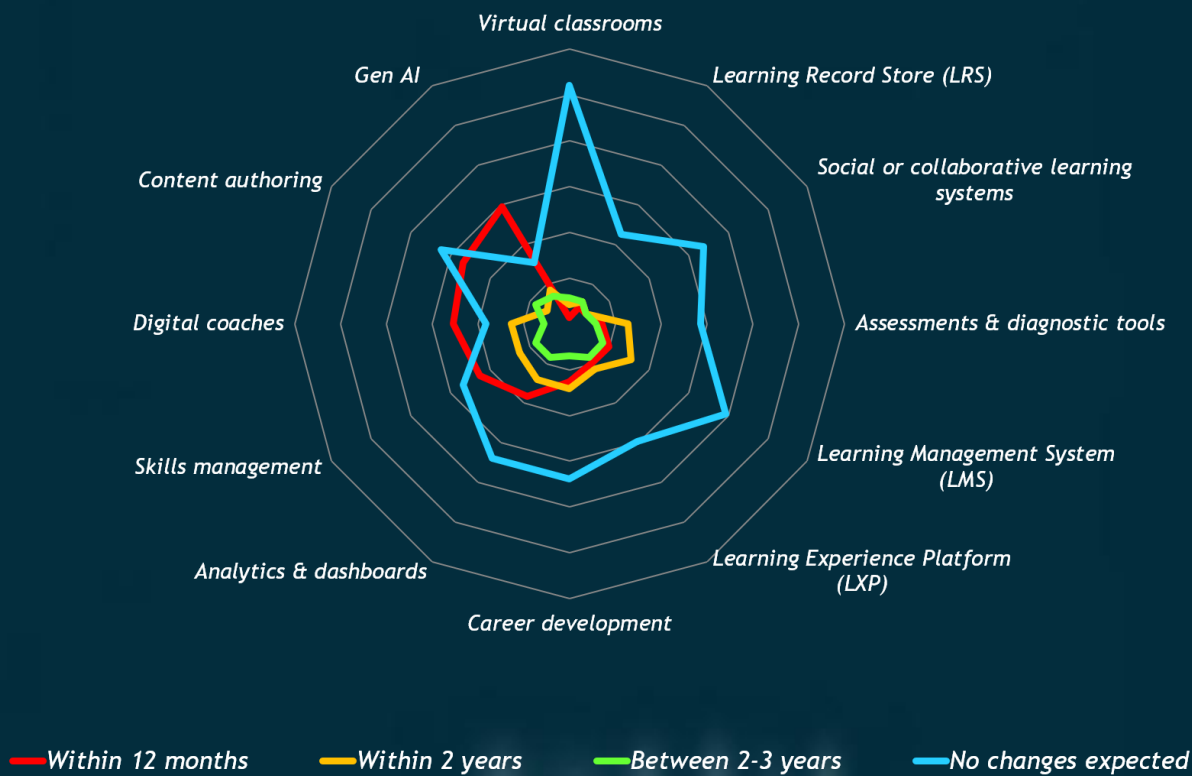
As L&D teams look to address strategic weaknesses in their ecosystem there is a clear demand for AI, skills, analytics, authoring and career development capabilities. Whilst content authoring is an opportunity for operational efficiency, the others represent a significant shift into enabling organisational transformation and influence. But whilst all digital technologies seem to have a positive moment, there are shifts emerging too - especially in the area of LMS solutions - where nearly one in five is planning to use their LMS less. There is a shift in the nature of the learning experience that learning teams increasingly do not think can be satisfied by traditional platforms.

How do you expect your demand for digital learning platforms to change in the future?



But of all these, the focus on gen-AI, digital coaches, skills and analytics stands out as the most eye catching. All of these lead learning teams’ purchasing intentions in the coming year. Whilst at the other end of the scale, more established solutions like LXP, LMS, and virtual classrooms all have a majority who don’t expect any solution change. As a result, there is a risk of stagnation for incumbent LMS solutions, and vendor growth for LXP and LMS solution providers will be dependent on innovating fast in the right areas - namely gen-AI, authoring, digital coaches and skills management.

When do you intend to change your learning platforms in the future?



Sources of Information & Background
As Europe’s #1 HR Industry analyst, Fosway is uniquely positioned to help the industry with independent research on these issues. More information and insight on our research will be made available on www.fosway.com

Fosway Group conducted the survey of its corporate research network and Learning Technologies Show conference attendees in partnership with Closer Still between February 2026 to April 2026. Responses were gathered from CHROs, Talent & L&D Directors, Managers and Learning, Talent & HR Technology professionals.

Results are drawn primarily from enterprise organisations in Europe and the survey includes responses from 334 individuals. Over 77% of respondents are based in European organisations, and over 62% have a global role.

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