Digital Learning Realities 2026

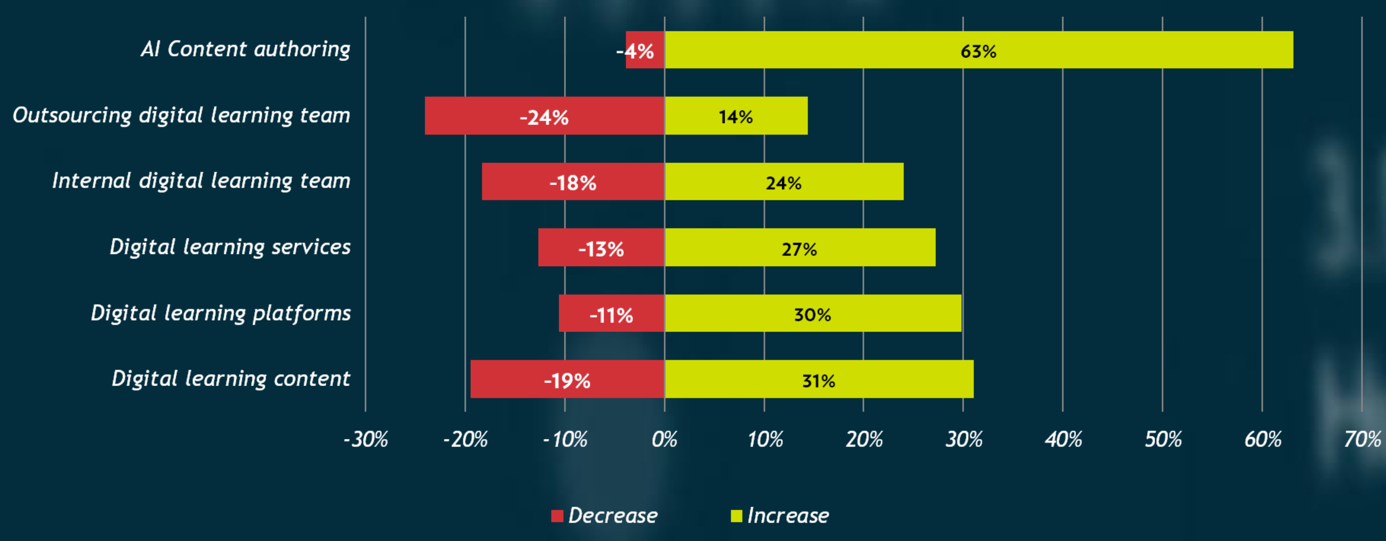
AI in Learning - Impact on L&D Budgets and Investment

In association with

The momentum behind AI content authoring continues to soar as it outstrips all other plans for investment in digital learning

Whilst the momentum for investing in AI-enabled content authoring is repeated this year, there are interesting nuances in the 2026 results that make it different from last year. 63% are expecting their investment in AI content authoring to grow, and the impact of that investment appears to be coming at a cost. Namely the investment in the internal digital learning team and outsourcing. AI is really changing the way organisations think about investing in L&D. AI automation is starting to nibble more aggressively at the core digital learning team than it has done before. AI has become a growing resource line for L&D projects and is already changing the shape of the L&D team.

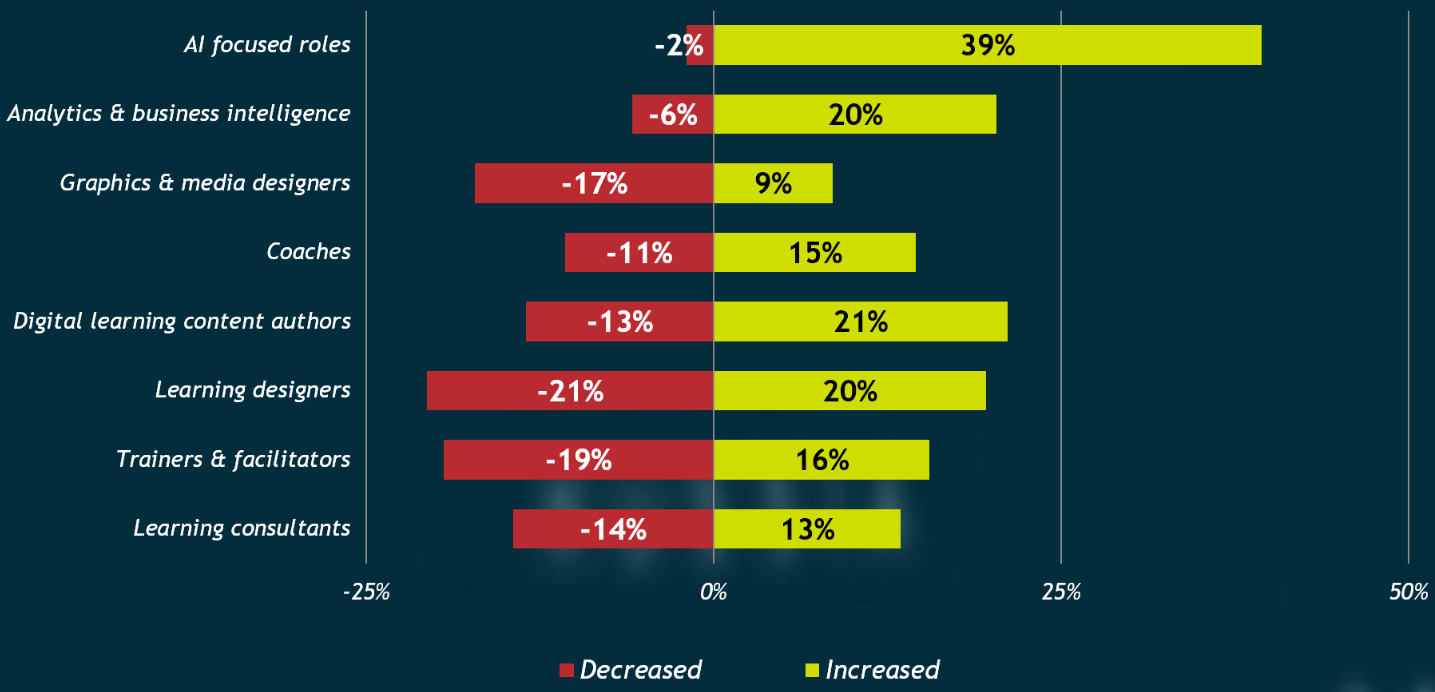
How do you expect your investment in digital learning to change over the year ahead?



AI- and analytics-focused learning roles have grown significantly just as traditional learning roles have stagnated and declined

As we move into the new era of work, AI and business intelligence are leading growth roles for learning teams. This comes at the expense of more traditional learning roles. Whilst AI and analytics roles are booming, those focused on training and facilitation, learning design, graphics and media as well as consulting have all come under increased headcount pressure. With this data we are seeing the metamorphosis of L&D teams in real time - powered by greater line of business autonomy and AI.

How has your learning team headcount changed over the past year?



Learning teams are shrinking at the fastest rate since the start of the decade

It's been a tough year for learning professionals, and our survey data shows us why. The negative trend around learning headcount grew again this year.

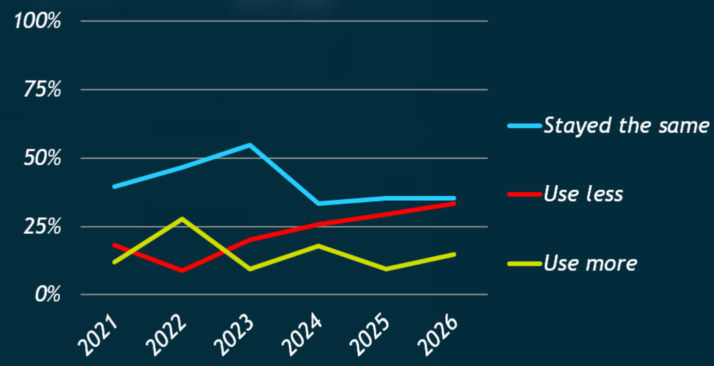
The percentage of L&D teams using full-time employees to support learning projects fell to its lowest level in seven years. Now one third of learning functions expect to use fewer full-time learning professionals to complete learning projects. And the trajectory of that trend shows no signs of weakening into 2027. It's a very challenging time. Learning teams are getting leaner just as expectations for their output and outcomes are increasing.

Subject matter experts and projects are increasingly expected to fill the gap in L&D resourcing

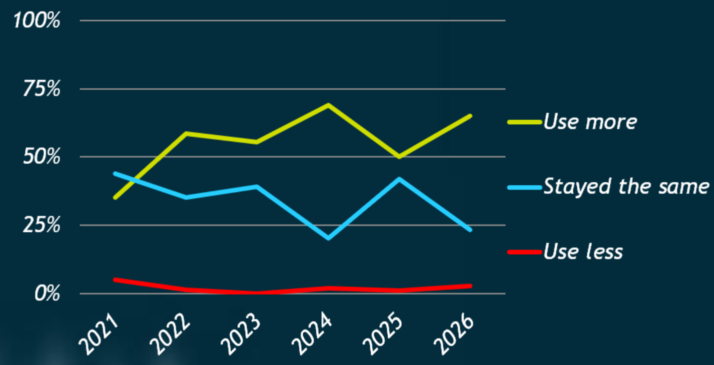
Over the past seven years subject matter experts and business projects teams are Increasingly, expected to become self-sufficient when in resourcing learning programmes. Since 2021 the dependence of SMEs and project teams has grown by over 25%. It's a solid pattern. Those rejecting self sufficiency are negligible, with less than 5% intending to use SMEs less. In a cost-conscious world, it makes perfect sense for L&D teams to make sure that projects tale responsibility for their total cost including training. Delegating learning back into lines of business has its risks, but it is no coincidence that the growing adoption of generative AI is happening at the same time. And the two trends of AI and business enablement look like they will fuel each other for the foreseeable future.

How are you planning to resource L&D projects in the year ahead?

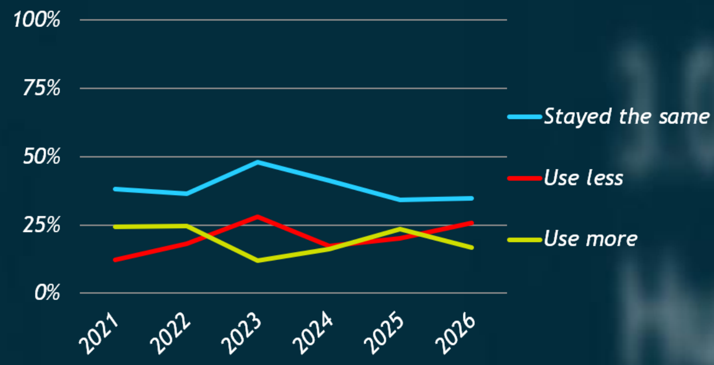
Hiring full-time employees



Upskilling SMEs and project teams

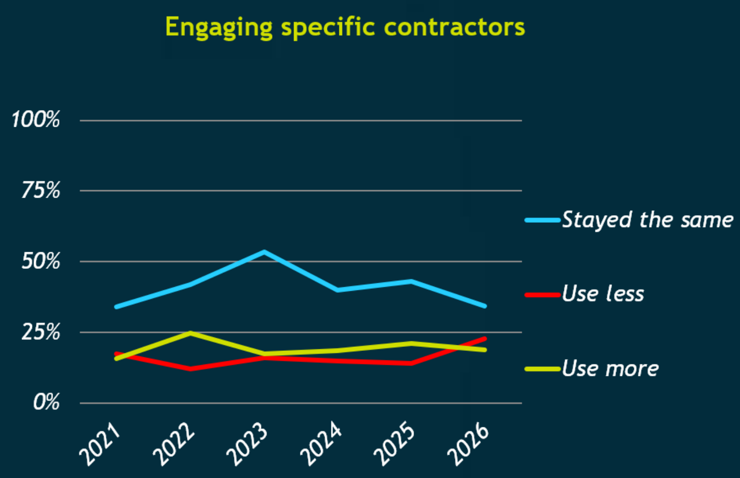


Using external suppliers



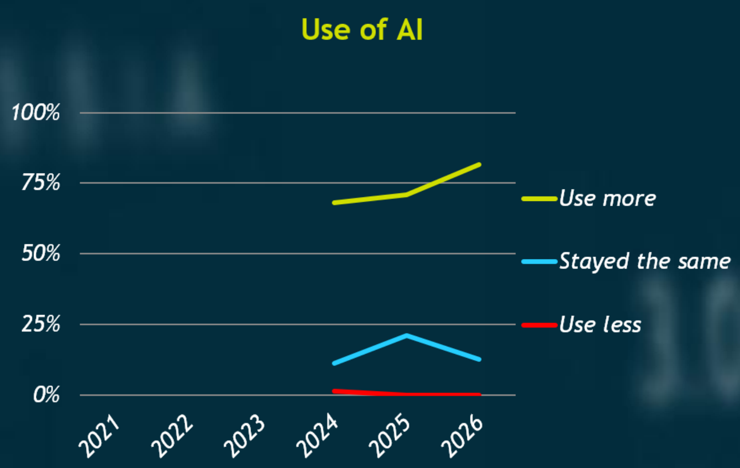
External suppliers and contracting resources are experiencing a SME and AI squeeze

The use of external suppliers for digital learning content continued to be negative again this year. Partly driven by cost, but also because L&D teams are delegating learning responsibility and cost back into projects and SMEs. As a result, the spend on external contractors and suppliers is being squeezed. The external resourcing for learning projects has been walking a paper-edge since the start of the decade. But the seven-year trend is clear. Buyers are less inclined to use external resources. This presents a major challenge for the vendor community, and it will put their business models under threat unless they can accelerate the radical innovation that makes their solutions more effective, scaleable and cheaper than organisations creating content themselves.



AI is a MEGA-disruptor for learning teams

The chart speaks for itself. Even when we first asked the question three years ago about how L&D teams intended to resource learning projects - AI was the leading focus and that has grown steadily. Over 80% of learning teams expect to increase their use of AI. To be clear, this trend is unparalleled, accelerating and learning teams are never going to be the same again because of AI.



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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