

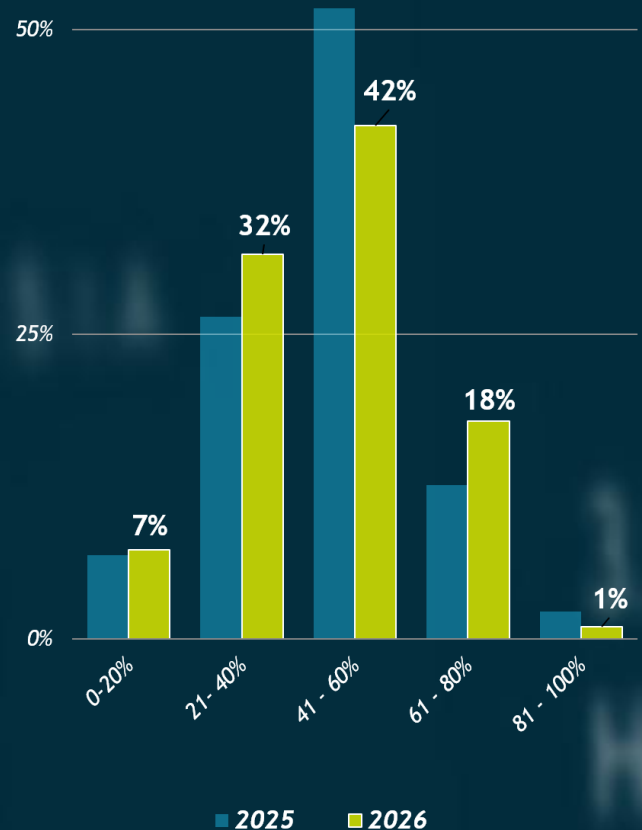
Digital Learning Realities 2026

AI in Learning - Effectiveness and Cost Opportunities

Over half of L&D teams think half of what they do today could be replaced by AI and still be effective

The perception is telling. 61% of L&D believe that between 40% and 60% of what they do today in L&D could be replaced by AI and still be effective. And perhaps this is at the root of many of the other data points in our infographics this year. The ability of AI to support, replace and augment L&D across its operations is seen as truly revolutionary. Both for learning teams but also in its knock-on impact on transforming learning experiences. AI is coming to take away L&D tasks and even at the more conservative expectations - 93% of L&D teams think that by 2030 at least 20% of they do could be automated by AI. And year on year the expectations seem to be growing. Based on those expectations - L&D teams need to have some serious conversations about their future role and their value proposition to their organisation - if they are to maintain anything approaching their existing resourcing levels. And much of those conversations need to be led by how effective AI in different parts of the learning function and experience really are!

By 2030 how much of what L&D does today do you think could be replaced by AI and still be effective?

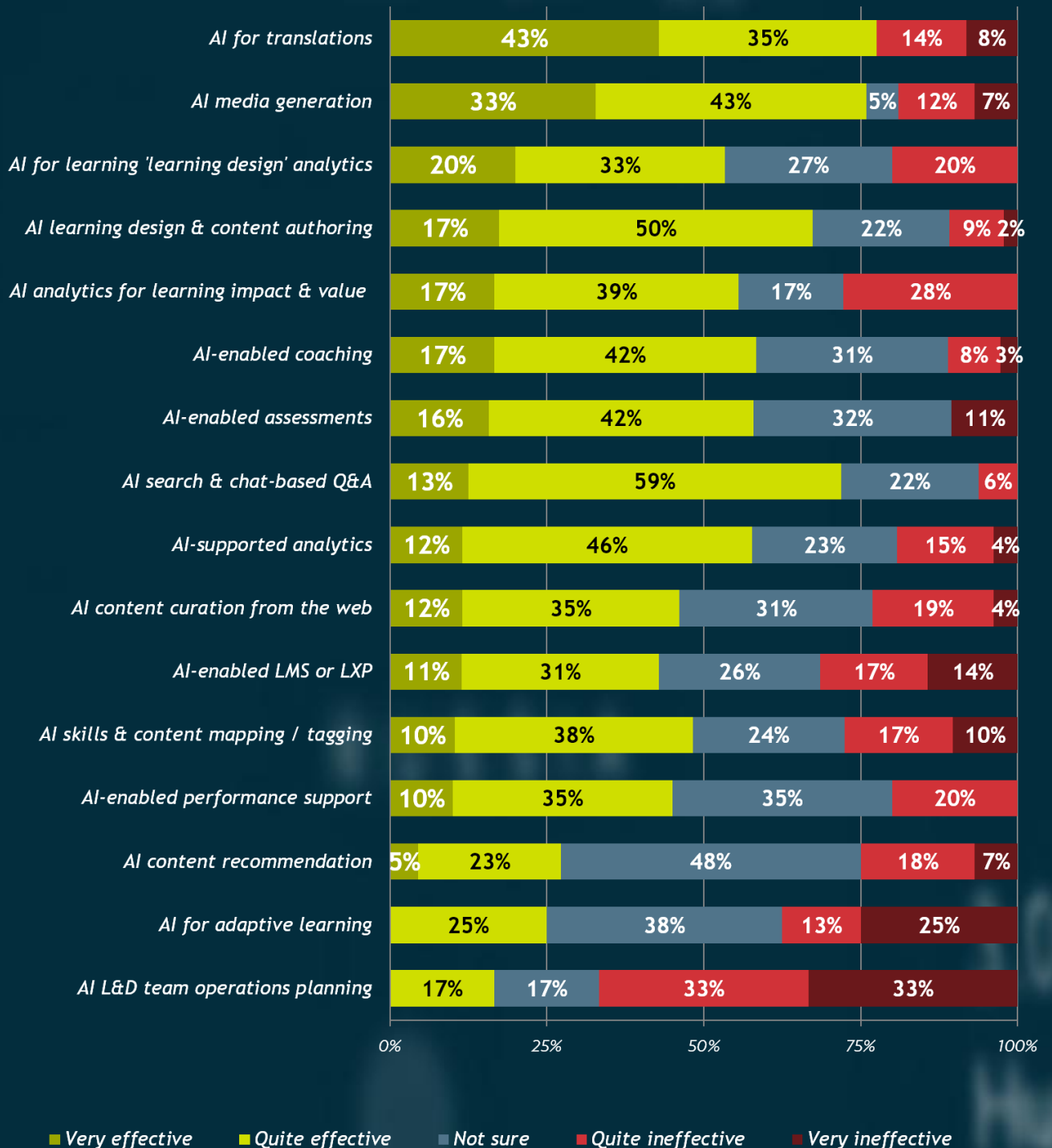


Using AI to support the development of learning resources and experiences is seen as the most effective use of AI in learning

L&D teams have always been delivery focused and the adoption of AI to accelerate and reduce learning production costs is where L&D teams see the use of AI as being the most effective. Clearly in the use of AI translations, media generation, content authoring and coaching - AI is offering the L&D team the opportunity to scale like never before and it is being effective. The use of AI to support the evaluation of learning design and tracking learning outcomes is also proving to be very positive. These are areas that L&D struggled to do in the past and AI is enabling a level of tracking that wasn't previously possible to prove learning effectiveness. Measurement of learning outcomes has been systemically problematic for L&D professionals and AI is helping them to bridge the gap.

Enhancing learning experience through chat-based search, AI-enabled assessments and coaches have also been seen as effective uses of AI. But that sense of AI's value begins to waiver around more critical AI applications like the AI-enabled LMS/LXP, skills, performance support and adaptive learning. These AI use cases are seen as being effective for learners and the learning team by less than half of learning teams. Looking at it from a different angle, over 80% don't think AI is 'VERY EFFECTIVE' for the majority of applications it's being put into. Yes, it might be doing an okay job, being 'quite effective' but overall, there are reservations about the ability of AI to do an excellent job. And those reservations need to be kept in mind as L&D teams shape their roles and responsibilities as we transition into the future. The questions it generates are: How much backfilling do I need from my L&D team to enable AI be properly effective and as it takes on more tasks? How much human effort is really required to bring what AI does up to a suitable standard? For all the innovation, the human is still significantly in the loop - even if the pressure to fully automate L&D is high.

How effective have the AI solutions you are using or piloting been in delivering value for your learners and learning team?



Early adopters of AI are reporting significant saving for off-the-shelf content, learning platforms, bespoke learning and their learning operations

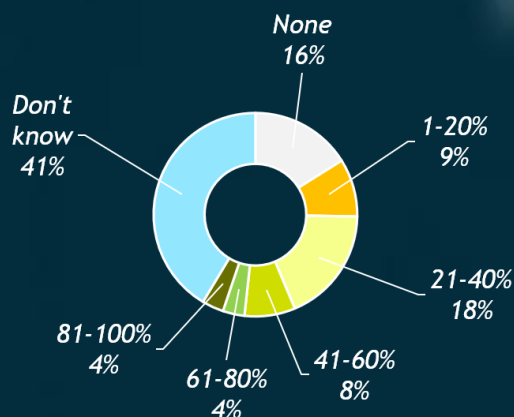
Of all the areas of AI savings for learning teams it's in bespoke projects that the most significant impacts are being felt, and the scale of those savings is potentially game-changing. 43% are achieving saving on bespoke learning projects of at least 21% to 40% through their adoption of AI. But the impact on other parts of the L&D cost base are equally disruptive. For learning operations and learning platforms over a quarter of learning professionals are saving more than 20% of their operating costs. And for off-the-shelf learning a third are making at least 20% savings.

What's more, there is a noticeable group of around 'one in five' who are realising savings of over 40%. With that in mind, it's hard not to see two things coming as we approach 2030. Firstly, a strong pull into adopting AI in learning - purely on cost advantages. But secondly, a choking effect on some as generative AI eats into some content formats.

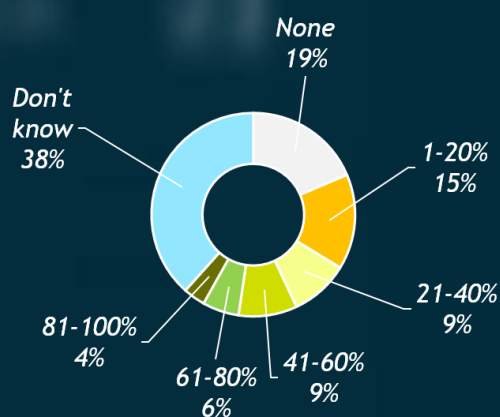
Now we are still seeing pricing models evolve, so it will be interesting to see if the cost advantage is sustained. Buyers will need to carefully understand and contract the pricing of AI carefully to control cost growth in the future, especially as usage expands. We will have to see how these cost savings evolve over time, and there is still the question of whether the quality meets the cost expectations. But ultimately this all comes back to the effectiveness of what AI does - and that is not always clear. And therein lies the rub. If this is just about cost - then you can switch everything to AI. But if you want something that is effective and works, you need to invest in AI cautiously. Yes, cost is important - but the value of what you do matters more! Which brings us full circle to how L&D teams become more effective in proving their value-add in the new world of work.

As a percentage - how much of a saving is AI enabling you to deliver over your previous non-AI enabled approaches?

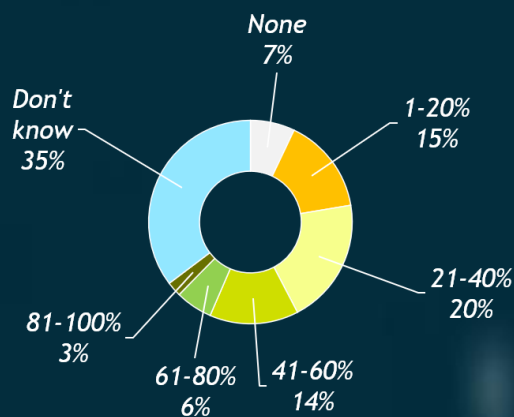
Off-the-shelf learning content



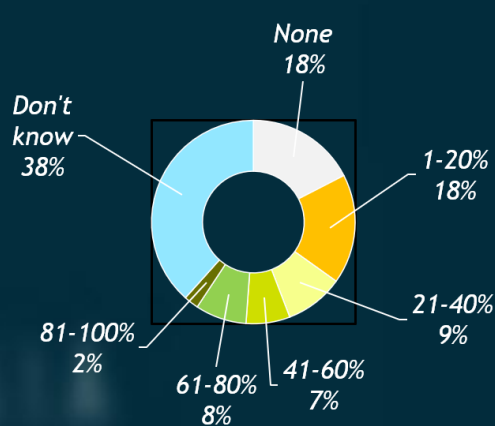
Learning platforms



Bespoke learning projects



Learning operations



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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