Learning and Development
Global Sentiment Survey

Key L&D trends: Poland

March 2020

GSS 2020 (Poland)

- 1. Virtual and augmented reality (10)
- 2. Artificial intelligence (5)
- 3. Learning analytics (1)
- 4. Personalization/adaptive delivery (2)
- 5. Micro learning (6)
- 6. Learning experience platforms (4)
- 7. Mobile delivery (12)
- 8. Collaborative/social learning (3)
- 9. Neuroscience/cognitive science (13)
- 10. Consulting more deeply with the business (8)
- 11. Showing value (9)
- 12. Coaching/mentoring (7)
- 13. Video (15)
- 14. Performance support (11)
- 15. Other: (16)
- 16. Curation (14)

Number of voters = 103

Figures in brackets show world rankings (n=2,278)

- Poland above global ranking
- Poland below global ranking
- Poland and global rankings equal

About the survey

The L&D Global Sentiment Survey 2020 ran for 49 days in late 2019 and early 2020, collecting votes from 2,278 people in 86 countries.

Voters answered the question: *What will be hot in workplace L&D in 2020?* No definitions were given of the options or the word 'hot'. The survey's format has remained unchanged since it started in 2014.

92% of voting is concentrated in five **regions**: Europe (821), UK (517), India (198), North America (353) and Australia/New Zealand (216). There were 15 **key countries** in which 25 or more people voted.

Participants were contacted by social media and email. They chose three options from a list of 16, including a free text option for their own suggestions.

For more information

To download the report for the 2020 L&D Global Sentiment Survey, all previous reports, and this and all other country reports, visit:

bit.ly/DHTS-R

Summary: Pragmatic, but with vision

The 2020 L&D Global Sentiment Survey suggests Polish voters are pragmatically focused on solving immediate issues in L&D, with a technological focus and an eye to the future.

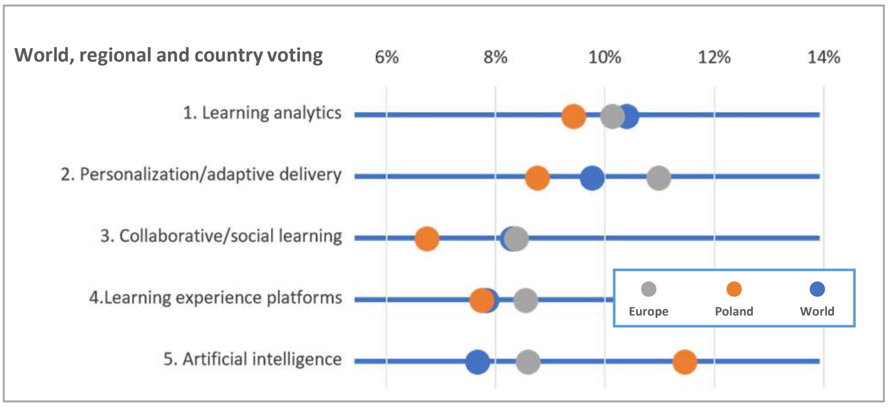
Among the ideas ranked in the top five globally, Polish voters definitely favour those supported by data, for example, in *Artificial intelligence* and *Learning analytics* rather than *Collaborative/social learning*, which ranked #8 on the Polish table, against #3 globally. For more on this, see Poland and the World, below.

In addition, the Polish voting pattern closely follows the pattern of the pragmatic Group B voters (see analysis page 2), with a focus on solutions for content delivery such as *Micro learning* and *Mobile delivery*, while more abstract options were voted down (eg *Curation* is at the bottom of the Polish rankings).

As well as this focus on pragmatic problem solving, however, the Polish vote showed one, unique anomaly. *Virtual and augmented reality* topped the rankings. Partly this may be due to our source of votes in Poland – largely collected via a single partner – but it also suggests that the combination of a focus on both delivery and technology has a visionary edge, a willingness to adopt the latest ideas.

Caveat: this is one year's data. Next year we hope to be able to start plotting trends.

Poland and the world



Ahead of the trends, and surprising focused on VR

Across the five ideas rated highest globally, Poland's voting is closely in sync with the world and with Europe on two: *Learning analytics (#1)* and *Learning experience platforms* (#4). On *Personalization/adaptive learning* (#2) it varies slightly, and is an outlier on *Collaborative/social learning* (#3) and *Artificial intelligence* (#5).

Poland's enthusiasm for *Artificial intelligence* (#5) is out of step with both the global and European vote. At 11.4%, it is the highest vote for AI among any key country (see box, left). Together with the high 9.4% vote for *Learning analytics* (#1), this shows a Polish appetite for data-driven approaches to learning.

At 8.8%, the Polish vote for *Personalization/adaptive learning,* is 2.2% behind Europe's 11% vote. Of the 10 key countries (see left) in Europe, only Switzerland's vote (n=27) was lower. Similarly, the 6.7% Polish vote for *Collaborative/social learning* (#3) was below the world/European vote of about 8.4%. Both *Personalization* and *Collaborative* have long been popular globally, sharing the #1 and #2 rankings from 2015 to 2019, but are now falling in popularity. Perhaps Poland is ahead of the trend in voting less for them.

The biggest surprise is Poland's vote for *Virtual and augmented reality*, at 11.4% this is the highest vote for the option, and double the global vote of 5.7%. Only India comes close in similar enthusiasm, at 7.9%. For an exploration of the reasons behind this vote, see Technical, Innovative Pragmatism at the top of page 2.

Published by Donald H Taylor Services Limited,
in association with i-pro elearning, Poland

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New ideas in L&D: the five fates

Over time, the ideas presented in the poll follow predictable patterns. A few ideas rise up the results table over time, showing voters think them 'hot'. The remainder fall away, but that descent can mean different things:

- **Stars**
A few ideas grab the imagination and become more popular year on year.
- **Staples**
Some ideas become business as usual, accepted as the staples of L&D.
- **Wallflowers**
Some ideas just never take off. These are the ideas that everyone talks about, but nobody adopts at scale.
- **Aspirations**
Between Staples and Wallflowers, a few ideas are Aspirations – they have a chance of wider adoption, but may end up only applicable in niches.
- **Perennials**
A handful of ideas return year after year. These Perennials will probably always be on the radar of L&D.

Technical, innovative pragmatism

Within the global survey population, there are two groups: members of Group A respond early, and are opinion leaders. Group B members respond later, and are pragmatic decision makers (see bottom left for more on the two groups). While the Polish vote is not large enough to divide into these two groups, the three tables below show it is very close to Group B's pattern of voting.

Polish respondents are keen on 'Staples' (see box left), solutions to their practical problems, rather than the more conceptual 'Wallflower' ideas, favoured by Group A.

As with Group B, *Micro learning* (Aspiration) and *Mobile delivery* (Staple) rank higher among Polish votes than they do on the Global table (#5 and #7 for Poland vs #6 and #12 globally). These options are highlighted in grey below.

In contrast, Poland votes down the more conceptual Wallflower idea *Curation,* just as Group B does. This idea may be too abstract, may not provide enough practical help to Polish voters' issues. Similarly, the Poles ranked *Consulting more deeply with the business* (Perennial) a lowly #10 (Group B ranked it #12). Both these options are pink on the tables below. The Polish vote, in other words, like the majority of voters on our global survey, focuses on content delivery and solving today's L&D issues.

This pattern of pragmatic voting, however, does not explain one anomaly – the uniquely high ranking given to *Virtual and augmented reality* (Aspiration). There are two possible explanations for this. First, there is some evidence investment in VR in Poland has created a localised specialism in Gaming and Virtual Reality expertise. Second, most Polish respondents came via one local partner, and this may have skewed our sample. The high vote for VR and AR may be due to either or both of these.

The two groups and Poland

GSS 2020 (Group A, global)	GSS 2020 (Poland)	GSS 2020 (Group B, global)
1. Learning analytics (1)	1. Virtual and augmented reality (10)	1. Learning analytics (1)
2. Personalization/adaptive delivery (2)	2. Artificial intelligence (5)	2. Personalization/adaptive delivery (2)
3. Consulting more deeply with the business (8)	3. Learning analytics (1)	3. Collaborative/social learning (3)
4. Learning experience platforms (4)	4. Personalization/adaptive delivery (2)	4. Micro learning (6)
5. Showing value (9)	5. Micro learning (6)	5. Artificial intelligence (5)
6. Artificial intelligence (5)	6. Learning experience platforms (4)	6. Learning experience platforms (4)
7. Collaborative/social learning (3)	7. Mobile delivery (12)	7. Coaching/mentoring (7)
8. Performance support (11)	8. Collaborative/social learning (3)	8. Mobile delivery (12)
9. Coaching/mentoring (7)	9. Neuroscience/cognitive science (13)	9. Virtual and augmented reality (10)
10. Curation (14)	10. Consulting more deeply with the business (8)	10. Showing value (9)
11. Micro learning (6)	11. Showing value (9)	11. Performance support (11)
12. Virtual and augmented reality (10)	12. Coaching/mentoring (7)	12. Consulting more deeply with the business (8)
13. Neuroscience/cognitive science (13)	13. Video (15)	13. Neuroscience/cognitive science (13)
14. Video (15)	14. Performance support (11)	14. Video (15)
15. Mobile delivery (12)	15. Other: (16)	15. Curation (14)
16. Other: (16)	16. Curation (14)	16. Other: (16)
Number of voters = 557	Number of voters = 103	Number of voters = 748

Figures in brackets show global rankings.
Most significantly differing options highlighted.

Two groups

In the voting population are two groups. Group A (opinion leaders) are contacted via social media at the beginning of the poll and often set trends. Group B, decision makers, are reached later, by email and will favour some (not all) of options supported by Group A, usually 1 to 2 years later.

The vote in Poland: echoes Group B, practical decision makers

The left and right tables above show how Groups A and B (see box, left), voted globally. The voting population in Poland is not large enough to divide into two statistically significant groups, but looking at four indicative options, the Polish vote is clearly closer to Group B (right) than Group A (left). *Curation* is a classic Wallflower idea (see box, top left) – good in theory, difficult to implement in practice. Poland placed it at #16, Group B at #15. Poles ranked the more practical *Mobile delivery* [#7] and *Micro learning* [#5] in the top half of the table, like Group B. In contrast *Consulting more deeply with the business* ranked at #10 for the Poles, very similar to Group B's #12.

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