UCISA Reports

2024 Digital Education Survey for Higher Education in the UK

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2024 Survey of Digital Education for higher education in the UK

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Introduction

This report records the results from a national survey undertaken by UCISA into the development, management and support of digital education in UK higher education institutions.

It builds upon previous UCISA Technology Enhanced Learning (TEL) and UCISA Digital Capability Surveys. Questions from both surveys have been reviewed and combined into a more comprehensive review of digital education provision within UK higher education, focussing on key topics such as how digital education is used, the systems supported, and provision for digital capabilities and digital accessibility.

In part, the combination of these surveys is an outcome of the COVID-19 pandemic where the significant increase and use of online education approaches and tools came to the fore along with the commensurate skills and competencies required to put those tools to good effect.

This Survey highlighted the number of core TEL tools supported by institutions, the ongoing reviews of systems and the major use of VLEs for blended learning, with an accompanying increase in staff supporting digital education.

The years since the pandemic have been significant for UK Higher Education. While the shift to online education during the pandemic was a necessity, post pandemic there has been a call from government, students and institutions to move back to more campus-based learning and teaching delivery.

This combined Survey sought to understand the drivers and organisational adjustments that facilitate organisational approaches and digital transformation projects in relation to digital education and how they have changed over time.

The Survey's key findings highlight the very real challenges that institutions are facing in terms of staffing and where they perceive that there are challenges ahead. Artificial intelligence is a prime example of a new technology that is having an impact on institutions in terms of technical and policy implementation.

The Survey results are presented to consider both the type of institution and where in the UK institutions are located, and for the first time with this new Survey, analysis has been undertaken to gather insights on how different sized institutions are supporting digital education. It is hoped that these insights will be of value when seeking to interpret the data and understand sector-wide developments.

Key Themes Emerging from the Survey

1. Institutions are focused on providing a student experience that meets student expectations in relation to technology. There is also a clear recognition of the role that senior leaders play in helping to drive the development of digital education.
2. Supporting digital education is still very much focused within Digital Education teams or their equivalent; however, the results identify where these teams collaborate with other key departments such as IT and the Library. Many respondents to the Survey stated that they anticipate staffing changes but were unsure of how staffing provision may change, reflecting some of the financial uncertainty across the sector.
3. Digital capabilities, while recognised as important, are not seen as a high factor of digital education. This is reflected in the number of respondents who are not measuring the development of digital capabilities for either staff or students.
4. The use of digital education tools and systems is still high across many courses. Blended learning, with lecture notes and supplementary resources, is still the most prevalent mode of delivery. Hybrid/Hyflex is still not well established across the sector though 40% of departments deliver fully online courses.

5. Artificial intelligence is perceived as both a useful tool as well as a particular challenge for HE. Utilisation of AI tools such as ChatBots continues but the introduction of generative AI tools is an area where most institutions are still exploring the implications, and many have not yet developed policies that support both staff and students with regard to appropriate use of these emerging technologies.

6. Time for the development of digital education continues to be perceived as the biggest potential barrier, in part reflecting some of the uncertainty in staffing across the sector alongside competing demands on staffs' time.

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Preface

As this is a survey combining questions from both previous TEL and Digital Capabilities Surveys, there have been some changes to questions and the options included. Where possible, language has been kept consistent with previous surveys; however, for this Survey, comparative, longitudinal data with earlier surveys is not presented. Similarities in trends with previous survey data is indicated in the analysis where appropriate.

Background

This combined Survey presents a natural evolution of digital education as it has emerged from its initial set of questions as a survey looking into Virtual Learning Environments and the equivalent Digital Capabilities Survey.

The Survey presents a combination of both the ever-increasing range of digital systems and tools that support digital education as well as exploring the development of staff and students' digital capabilities. By doing so, the Survey helps to determine the best way to embed and support those systems to ensure the best outcomes for students in terms of learning and teaching.

The UCISA community and the wider digital education community have always valued the sector insights that previous surveys have provided, illustrating trends within Higher Education that assist in comparing their institutional provision in order to support policy development and investment in digital education.

The Survey recognises the value gained from those insights and continues to provide analysis based on type of institution and country. However, as with previous surveys caution should be exercised against using the data presented in the Survey as benchmarks or performance indicators. There are different perspectives on where an institution may wish to be located across the spectrum of options and there is no single path of uniform development in the provision and support for digital education.

The focus of responses is at an institutional-level and for this Survey, additional guidance was provided regarding key roles that could contribute to its completion, in recognition of the breadth of activities covered under the digital education banner.

Respondents to the Survey cited that they had consulted with a broad range of stakeholders. In total over 166 different roles were cited, reflecting how responsibility for digital education has become a much more shared endeavour within institutions.

The Survey, therefore, is the first full survey of institutions since the COVID-19 pandemic and as such reflects the responses of institutions with some years distance since the mass adoption of online learning.

Circulation and complete of the 2024 Digital Education Survey

Both an online version and a word version of the Survey was circulated to key digital education contacts within institutions in January 2024 and an email message was posted on the UCISA Directors-List as well as via the Head of eLearning forum Jisc listserv highlighting the survey and inviting colleagues to complete their institutional return.

The online survey tool was eventually closed to submission at the end of April 2024.

Institutions surveyed

All UCISA institutional members were invited to respond to the Survey, along with respondents to the previous surveys.

Presentation of the data

The Report commentary focuses on results from the 2024 Survey and where appropriate, the results are presented in tabular form. In most cases only the leading responses for each question are given in the tables within the main report (e.g., the top five responses). The full tabular data for each question for 2024 is presented in the Appendix of the Report and the relevant tables are referenced in the report commentary.

As with previous TEL and Digital Capability Surveys, the analysis of the data is driven by type of institution (Pre-92, Post-92 and Other) and country (England, Wales, Scotland, Northern Ireland). For this new combined Survey, additional analysis was conducted on the size of the institution, based on student FTEs.

There is no longitudinal analysis presented for this Survey in recognition of the changes to the questions and structure of the Survey. However, if responses to a particular question suggested some trend to previous questions, this has been noted but no direct comparison should be drawn from the data.

Although 58 institutions responded to the Survey, not all questions were answered by all respondents. The number of respondents answering each question is therefore presented at the top of each table. A 'base definition' is given in italics, and the number of respondents is shown in brackets. It is worth noting that some country populations are relatively small (e.g. Wales, n=4; Northern Ireland, n=2) and, therefore, susceptible to dramatic swings in percentage scores when the number of respondents in these groups is further reduced for particular questions. Care is therefore needed in drawing comparisons between these and other groups, based on the percentage scores recorded for those questions where the response level is much reduced.

In terms of the presentation of data within the Report, percentages have been rounded up (>/ = to 0.5) or down (< 0.5) to whole numbers, so a column of values will not necessarily add up to 100%.

This Report focuses primarily on presenting the data in a manner that will enable institutions to position themselves in relation to sector trends. It is not the main purpose of this Report to provide detailed interpretation of the data, although some trends will be highlighted.

Response Rate

Responses were received from 58 institutions; this response rate is lower than previous TEL surveys but higher than Digital Capability Surveys. As a new Survey with a combined focus on Digital Education, it is difficult to assess whether this response rate is realistic.

Responses were received from all types of institutions with a higher response rate from Pre-92 compared with Post-92 institutions. The majority of respondents were based in English institutions.

New for this Survey, we asked respondents about the size of their institution, based on FTE. Equal numbers of institutions from medium and large institutions responded to the survey, with approximately half the number of small institutions responding.

Type	Number Responding	% responding
Pre-92	30	52%
Post-92	25	43%
Other	3	5%
Total	**58**	**100%**

Table A: Profile of respondents based on type of institution

Country	Number Responding	% responding
England	49	84%
Wales	4	7%
Scotland	3	5%
Northern Ireland	2	3%
Total	**58**	**100 %**

Table B: Profile of respondents based on country

Size of institution	Number Responding	% responding
Small (10000 or less FTE)	12	21%
Medium (10001-20000 FTE)	23	40%
Large (20001 or more FTE)	23	40%
Total	**58**	**100%**

Table C: Profile of respondents based on size of institution

Summary of Conclusions

Section 1

Enhancing the quality of learning and teaching for students continues to be a primary factor for institutions in relation to digital education. This has been the leading driver in the UCISA TEL Surveys since 2003.

The top three factors focus on students, showing that students remain central to institutional considerations for digital education.

Improving the accessibility to learning for all students was also a highly ranked factor. This compares with meeting the requirements of the Public Sector Bodies (Websites and Mobile Applications) (No. 2) Accessibility Regulations 2018 and Meeting the requirements of the Equality Act (2010) which are ranked 30th and 31st respectively.

Supporting the development of digital capabilities was ranked 14th as a possible factor for driving digital education.

Section 2

A wide range of TEL tools are supported across institutions; however, VLEs, text matching tools, reading list management software, as well as content management systems (CMS) and Electronic Management of Assessment (EMA) tools are the most frequently cited tools used in more than 50% of courses.

Outsourcing of Digital Education services is common across the sector with overall outsourcing of provision still high at 72%.

Lecture capture platforms, digital repositories (such as MS Office 365), VLEs (supporting the delivery of blended learning courses and fully online courses), and Media streaming are predominantly outsourced. Very few respondents are considering bringing outsourced services back in-house.

81% of institutions reported that they had undertaken a review in the last two years, with 76% reporting they had reviewed the VLE. Of the 59% who reviewed their polling systems, 48% reported the outcome of the review was to implement or pilot a new system.

Generative AI, perhaps unsurprisingly, featured in the top five services reviewed.

In terms of new or additional digital educational tools that institutions are considering, Generative AI systems were the most often cited tool to be implemented or piloted over the next two years. 65% of institutions have developed a policy as part of their engagement with AI.

Digital Exams and e-Portfolios were the next two most cited tools.

Section 3

In terms of course delivery, blended learning with supplementary resources remains the most prevalent delivery mode across the sector with 78% of respondents supporting this across their institution.

There was a decrease in the use of active blended learning with 29% of institutions reporting that this is supported extensively across the institution, compared with 36% in 2022 but still up from the 20% in 2020. The reasons for this are unclear but may be due to a different response rate for this Survey.

Hybrid learning continues to be offered post pandemic, but this provision is localised within institutions especially at individual teacher level.

Hybrid/Hyflex delivery still does not seem to be well established across the sector.

Despite a growing number of new posts to support online delivery over the last few years, the number of institutions supporting fully online delivery remains low.

When asked how the development of digital capabilities was measured either for staff or students, the majority of respondents reported they were not measuring the development of digital capabilities.

For those who do measure the development of digital capabilities, a self-assessment tool was cited, including the Jisc Digital Discovery tool and the most cited use of the resultant data was to inform future training.

Evaluation of the impact of digital education was undertaken by 52% of respondents with the accessibility of resources and a general review of digital education services the two most common aspects of digital education that were evaluated.

Section 4

Support and training for staff on TEL and digital capabilities is a key consideration for encouraging the development of digital education, and was ranked 3rd as a factor.

Libraries, Academic Study Skills or Digital Education teams were the most cited departments that take the lead in helping students.

For staff and students, optional in-person or online training and webinars by Digital Educations teams were the highest methods used. IT departments, led on helpdesks.

In terms of how achievements in digital capability were recognised, a range of methods were utilised. Digital champions/ambassadors were mentioned for both staff and students but are still low across the sector. It is interesting to see external certification offered to staff, but not so much for students (only 10%).

Section 5

In terms of supporting staff and students to develop their digital capabilities with respect to accessibility and inclusion, a greater focus was put on the provision of training for staff, whereas for students, support is more about providing online resources for them to discover. Very few institutions provide mandatory training.

In terms of the online resources for staff, 95% of respondents said they provide guidance on the creation of accessible and inclusive documents, with an almost equivalent focus on accessible documents/images. 86% of respondents provide guidance on accessibility checking. In comparison with the guidance available, currently 47% of respondents formally benchmark their progress, with a further 29% stating they do not do so regularly.

Section 6

For this Survey, we attempted to understand more deeply the provision of staff supporting digital education within an institution, recognising that it was ranked 3rd in terms of possible factors encouraging the development of digital education.

Often, provision of a variety of different activities supporting digital education were attributed to a single FTE making estimations difficult.

However, Digital Education departments led on both TEL end user support and pedagogic advice on the use of TEL tools, with IT departments leading on TEL technical support.

Staffing levels continue to change, though with current financial difficulties we note that these figures may not reflect changes that have occurred since the Survey took place.

43% of institutions reported an increase in the number of staff (both permanent roles and fixed-term roles dedicated to specific projects); however, 38% reported a recruitment delay or freeze.

43% of respondents anticipated changes in staff provision but were unsure how it might change, reflecting some of the uncertainty across the sector.

Section 7

We asked respondents about recent or prospective developments making demands, with Generative AI, perhaps unsurprisingly, making the most demands in terms of support.

It is interesting to note that Digital Assessment support, including digital exams, was the next most mentioned development though at a much lower level.

When asked what institutions observed as the potential barriers to developing digital education, the top three responses included lack of time, lack of internal sources of funding to support development and competing strategic initiatives.

Section 1: Factors encouraging development and transformation of Digital Education

Section 1 of the Survey looked at factors encouraging the development and transformation of digital education within higher education institutions. These questions are similar to those in previous TEL and Digital Capabilities Surveys. The options reflect the range of factors that institutions may consider when developing their digital education provision.

Question 1.1: Possible <u>factors</u> for driving digital education (TEL and Digital Capability) and the processes that promote it. How important, if at all, have each of these been in <u>your institution</u> to date?

For this question respondents were asked to indicate which factors have been important in driving digital education within their institution. Table 1.1 displays the top ten factors and processes driving digital education at responding institutions, ordered by their overall mean values, with the means and rankings also presented by type of institution.

Driving factors – top ten (Base: All respondents)	Total		Type					
			Pre-92		Post-92		Other	
	Mean	Rank	Mean	Rank	Mean	Rank	Mean	Rank
	(57)		*(30)*		*(24)*		*(3)*	
Enhancing the quality of learning and teaching in general	3.82	1	3.77	1	3.88	=1	4.00	=1
Assisting and improving the success, continuation and progression of students	3.79	2	3.70	2	3.88	=1	4.00	=1
Improving student satisfaction (e.g. NSS, PTES, PRES)	3.68	3	3.63	4	3.75	3	3.67	=8
Improving accessibility to learning for all students	3.63	4	3.67	3	3.54	=5	4.00	=1
Improving widening participation and inclusive learning and teaching	3.53	5	3.50	=5	3.54	=5	3.67	=8
Meeting student expectations in the use of technology	3.51	6	3.40	=7	3.58	4	4.00	=1
Technology developments	3.40	7	3.50	=5	3.29	11	3.33	=16
Expansion in course offerings	3.33	=8	3.23	11	3.42	=8	3.67	=8
Attracting new markets	3.33	=8	3.17	14	3.46	7	4.00	=1
Improving administrative processes	3.30	10	3.40	=7	3.17	=14	3.33	=16

Table 1.1 Factors driving digital education (TEL and Digital Capability).

Table 1.1 highlights that *Enhancing the quality of learning and teaching in general* is the top factor and has been the leading driver in TEL surveys since 2003. The other factors in the top six focus on students, showing that students remain central to institutional considerations for digital education. *Improving the accessibility to learning for all students* was ranked fourth, while *Meeting the requirements of the Public Sector Bodies (Websites and Mobile Applications) Accessibility Regulations 2018* and *Meeting the requirements of the Equality Act (2010)* (Table A1.1a in the Appendix) were the lowest ranked factors. Notably, meeting the regulatory requirements ranked somewhat higher in the 2020 TEL Survey.

There is little variation in the rankings between institution types. Institutions in Scotland ranked *Supporting the development of digital capabilities for students and staff* equal first (Table A1.1b in the Appendix), whereas the other countries ranked it fourteenth or lower; however, it should be noted that the rankings for Scotland are based on just three responding institutions, with ten factors ranked equal first.

Other types of institution and small institutions both ranked *Attracting home students* as a more important factor compared to the overall rankings (Tables A1.1a and A1.1c in the Appendix).

Question 1.2: Are there any other driving factors, for example, subject specific drivers, that are not in the above list?

This question invited a free text response, and of the 57 respondents who completed question 1.1, eight provided details of a range of additional or subject-specific driving factors.

The responses were from a mixture of Pre- and Post-92 institutions (Table 1.2) with the majority representing English HE institutions and a mix of medium and large institutions, with just one small-sized institution responding (Tables A1.2b-c in the Appendix).

Other Driving Factors (Base: All respondents)	Total		Type			
			Pre-92		Post-92	
	No.	%	No	%	No	%
	(8)		*(4)*		*(4)*	
Medical/Allied Health subject related drivers	4	50%	1	25%	3	75%
Education related subject related drivers	1	13%	0	0%	1	25%
Preparing students for employment	1	13%	1	25%	0	0%
Meeting OfS B Conditions	1	13%	0	0%	1	25%
Utilising secondments	1	13%	1	25%	0	0%
Subject specific physical environment requirements	1	13%	1	25%	0	0%
Technology expectations of students	1	13%	1	25%	0	0%

Table 1.2 Other possible factors driving digital education.

Half of respondents cited *Medical/Allied Health subject related drivers* as another factor driving digital education, while others cited a range of drivers from different subject factors to preparing students for employment.

Question 1.3: Possible factors that encourage the development of digital education and processes that promote it. How important, if at all, has each of these been in your institution over the past two years?

Respondents were asked to indicate which factors were responsible for encouraging the development of digital education within their institutions. Table 1.3 displays the top ten ranked factors and processes encouraging the development of digital education, with the factors ordered by their overall mean values (see Tables A1.3a-c in the Appendix for the full details), with the means and rankings also presented by type of institution.

Top encouraging factors (Base: All respondents)	Total		Type					
			Pre-92		Post-92		Other	
	Mean	Rank	Mean	Rank	Mean	Rank	Mean	Rank
	(57)		(30)		(24)		(03)	
Central university senior management support	3.65	1	3.63	=1	3.67	1	3.67	=2
Feedback from students	3.60	2	3.63	=1	3.58	=2	3.33	=8
Internal support and training to staff on use of TEL or development of their digital capabilities	3.58	3	3.63	=1	3.50	=4	3.67	=2
Availability of relevant support staff	3.56	4	3.63	=1	3.46	=6	3.67	=2
A senior institutional champion/leader	3.54	=5	3.50	8	3.58	=2	3.67	=2
Availability and access to tools across the institution	3.54	=5	3.63	=1	3.42	8	3.67	=2
Adherence to external policies (e.g. cyber essentials, GDPR)	3.53	7	3.57	7	3.50	=4	3.33	=8
University committees and steering groups which guide development and policy	3.46	8	3.63	=1	3.33	=11	2.67	=22
Technological changes/developments	3.39	9	3.47	9	3.29	14	3.33	=8
Feedback from staff	3.35	=10	3.33	12	3.38	=9	3.33	=8
IT policy/infrastructure enabling of innovation, e.g. a software upgrade	3.35	=10	3.43	10	3.17	17	4.00	1
Creation of a common user experience	3.35	=10	3.37	11	3.33	=11	3.33	=8

Table 1.3 Factors encouraging the development of digital education.

There is little difference in the rank order of factors compared to the 2020 TEL Survey, although *Central university senior management support* has risen from fourth in 2020 to first in 2024. *Feedback from students* continues to be ranked second, with *Internal support and training to staff on use of TEL or development of their digital capabilities* also ranked in the top three this year; compared to the 2020 TEL Survey when *Availability of technology enhanced learning support staff* was the top factor.

There is little discrepancy in the rankings by country, although it is perhaps worth noting that the Scottish institutions put equally high rankings against more of the local and policy-based factors and processes such as: local champions; action plans; IT infrastructure and baseline standards (Table A1.3b in the Appendix). However, it should be noted that the rankings for Scotland are based on just three responding institutions, with fourteen factors ranked equal first.

The size of an institution also shows a minor variance in the overall weightings of responses (Table A1.3c in the Appendix), with small institutions rating *IT policy/infrastructure* as their highest ranked factor encouraging the development of digital education, over *Central university senior management support* or *Feedback from students*.

Question 1.4: In what ways, if any, have you sought to _raise awareness_ amongst staff of the benefits of adopting digital education, in their teaching and assessment practices?

Respondents were asked to select the methods used at their institution to raise awareness amongst staff of adopting digital education in their teaching and assessment practice.

Approaches used to raise awareness _(Base: All respondents)_	Total		Type					
			Pre-92		Post-92		Other	
	No.	%	No.	%	No.	%	No.	%
	_(57)_		_(30)_		_(25)_		_(3)_	
Staff development programme(s)	52	91%	26	87%	23	96%	3	100%
Online training resources and guidance	51	89%	29	97%	21	88%	1	33%
Embedded within PGCert Teaching & Learning/Academic Practice programme for academic staff	50	88%	28	93%	21	88%	1	33%
Staff networks	50	88%	26	87%	23	96%	1	33%
Show and tell sessions	49	86%	24	80%	23	96%	2	67%
Internal conferences	45	79%	25	83%	20	83%	0	0%
Case studies	44	77%	25	83%	17	71%	2	67%
Professional recognition schemes (Advance HE PSF/CMALT)	44	77%	24	80%	19	79%	1	33%

Table 1.4 Approaches taken to raise awareness amongst staff of the benefits of adopting digital education.

Table 1.4 shows the top approaches used to raise awareness amongst staff of the benefits of digital education (those selected by more than 70% of responding institutions) and highlights that _Staff development programmes_ (91%) are ranked first, closely followed by _Online training resources and guidance_ (89%). Notably, small institutions rated _Online training resources_, _Staff networks_ and _Internal conferences_ less highly than medium or large institutions (Table A1.4c in the Appendix).

Ten institutions provided details of other approaches used to raise awareness of the benefits of adopting digital education, and the responses were very diverse, with school or specific communities practice networks, pilot projects or specific development programmes all mentioned.

Summary

While a broader range of factors encouraging the take up of digital education were presented within this Survey, to accommodate both TEL and digital capability factors, the top factors encouraging the development and transformation of digital education show a consistent theme with previous Surveys. _Enhancing the quality of learning and teaching in general_ remains the top driving factor with _Central university senior management support_ now cited as the main factor encouraging development and transformation.

In terms of raising awareness, _Staff development programmes_, _Online training resources and guidance_ and _Embedded within PGCert Teaching and Learning programmes_ are the top approaches that responding institutions used to illustrate to staff the benefits of adopting digital education in their learning and teaching practices.

Section 2: Technology Enhanced Learning Tools Currently in Use

This section invited respondents to report on the range of technology enhanced learning tools currently in use within their institution. This touched on any TEL systems developed in-house, as well as commercial and open-source tools. Respondents were asked how these tools were supported and managed, and whether they were actively reviewing their provision for the future.

Question 2.1: Which <u>centrally-supported</u> TEL tools are used by <u>students</u> in your institution?

Centrally-supported TEL tools used by students *(Base: All respondents)*	Total		Type					
			Pre-92		Post-92		Other	
	No.	%	%	Rank	%	Rank	%	Rank
	(30)(57)				*(24)*		*(3)*	
Virtual Learning Environment (VLE) (e.g. Blackboard, Brightspace, Canvas, Moodle)	57	100%	100%	=1	100%	=1	100%	=1
Content management systems (e.g. Google Docs, Microsoft 365, SharePoint)	57	100%	100%	=1	100%	=1	100%	=1
Document sharing tool (e.g. Google Docs, Microsoft 365, SharePoint)	57	100%	100%	=1	100%	=1	100%	=1
Webinar/virtual classroom (e.g. Class Collaborate, Microsoft Teams meetings, Zoom)	57	100%	100%	=1	100%	=1	100%	=1
Formative eAssessment tools (e.g. VLE, QuestionMark)	56	98%	100%	=1	96%	=8	100%	=1
Summative eAssessment tools (e.g. VLE)	56	98%	100%	=1	96%	=8	100%	=1
Collaborative tools (e.g. Discord, Microsoft Teams, Slack, Padlet, Miro)	55	96%	93%	=11	100%	=1	100%	=1
Media streaming system (e.g. Kaltura, Medial, Microsoft Stream, Panopto)	55	96%	97%	=8	96%	=8	100%	=1
Text matching tools (e.g. SafeAssign, Turnitin)	54	95%	97%	=8	100%	=1	33%	=20
Personal response systems (including handsets or web-based apps) (e.g. Mentimeter, Poll Everywhere, TurningPoint/PointSolutions, Vevox)	52	91%	87%	=15	100%	=1	67%	=11
Lecture capture technology (system to record teaching in a lecture theatre/classroom, e.g. Echo360, Panopto)	51	89%	100%	=1	79%	=16	67%	=11
Reading list management software (e.g. Leganto, Talis)	51	89%	93%	=11	88%	12	67%	=11
Asynchronous communication tools (e.g. discussion forums, Teams, Slack)	50	88%	97%	=8	79%	=16	67%	=11
Accessibility tools (e.g. Anthology Ally, Yuja Panorama)	49	86%	90%	=13	83%	=13	67%	=11
Hybrid delivery technologies (e.g. Teams, Class Collaborate, physical systems)	48	84%	77%	=18	92%	11	100%	=1
Mobile apps (e.g. CampusM, VLE)	47	82%	90%	=13	83%	=13	0%	=25

Table 2.1a Centrally-supported TEL tools used by students at more than 80% of responding institutions.

Table 2.1a shows the most used centrally-supported TEL tools at responding institutions (those with usage levels above 80%), with the breakdown of the data also provided by institution type. *Virtual Learning Environments (VLEs)*, *Content management systems*, *Document sharing tools* and *Webinar/virtual classroom* tools were all reported as being universally used across all responding institutions. Assessment tools for formative and summative activities,

followed by *Collaborative tools (e.g. MS Teams), Media streaming system* and *Text matching tools (e.g. Turnitin)* were the next most used TEL services. These results highlight the widespread adoption of tools for content delivery and assessment related activity across the sector. The high level of usage recorded for *Webinar/virtual classroom* tools and *Collaborative tools* may possibly be linked to the investments in these tools during the emergency remote teaching phase driven by the COVID-19 pandemic, which appears to have continued in the post-pandemic period.

Tables A2.1a-c in the Appendix provide the full data and the breakdowns by institution type, country and size of institution. Looking at the full data, the tables show that almost half of responding institutions are using *Generative AI* for teaching, while 44% indicate that it is being used by their students. When we consider the differences between institution types the use of *Generative AI to support teaching* is higher in Post-92 institutions. In contrast, Table A2.1a in the Appendix illustrates the higher usage levels of *Lecture capture technology* in Pre-92 institutions (100%) compared to Post-92 (79%) and Other institutions (67%). Focusing on the size of institutions (Table A2.1c in the Appendix), *e-Portfolios* appear to be used more in small institutions, while the use of *Mobile apps*, *Digital Skills tools* and *Virtual or Augmented Reality technologies* are more prevalent in medium and large institutions.

Overall, 21% of respondents identified other centrally-supported TEL tools, including simulations (noted by two institutions), peer evaluation, remote virtual science experiments, student evaluation tools, in-house analytics, captioning software and a digital assistant application. Several institutions also included references to tools for which there were options provided, including Padlet (3 respondents) and Mentimeter (1 respondent).

Comparison of findings from Question 2.1 and Question 3.9 *(Base: All respondents)*	Centrally-supported TEL tools used by students (Q2.1)		Approximate proportion of courses using different TEL tools in more than 50% of courses (Q3.9)	
	No.	%	No.	%
	(57)		(58)	
Virtual Learning Environment (VLE) (e.g. Blackboard, Brightspace, Canvas, Moodle)	57	100%	57	98%
Webinar/virtual classroom (e.g. Class Collaborate, Microsoft Teams meetings, Zoom)	57	100%	30	52%
Content management systems (e.g. Google Docs, Microsoft 365, SharePoint)	57	100%	44	76%
Document sharing tool (e.g. Google Docs, Microsoft 365, SharePoint)	57	100%	29	50%
Formative eAssessment tools (e.g. VLE, QuestionMark)	56	98%	36	62%
Summative eAssessment tools (e.g. VLE)	56	98%	35	60%
Media streaming system (e.g. Kaltura, Medial, Microsoft Stream, Panopto)	55	96%	37	64%
Collaborative tools (e.g. Discord, Microsoft Teams, Slack, Padlet, Miro)	55	96%	20	34%
Text matching tools (e.g. SafeAssign, Turnitin)	54	95%	54	93%
Personal response systems (including handsets or web-based apps) (e.g. Mentimeter, Poll Everywhere, TurningPoint/PointSolutions, Vevox)	52	91%	14	24%
Lecture capture technology (system to record teaching in a lecture theatre/classroom, e.g. Echo360, Panopto)	51	89%	44	76%
Reading list management software (e.g. Leganto, Talis)	51	89%	46	79%
Asynchronous communication tools (e.g. discussion forums, Teams, Slack)	50	88%	25	43%
Accessibility tools (e.g. Anthology Ally, Yuja Panorama)	49	86%	40	69%

Mobile apps (e.g. CampusM, VLE)	47	82%	32	55%

Table 2.1b Comparison of centrally-supported TEL tools used by students with the approximate proportion of courses using the different TEL tools (above 50% of courses for all institutions).

Table 2.1b compares the level of central TEL provision (question 2.1) with the proportion of courses using these tools across institutions (question 3.9, page 27).

Table 2.1b shows that *VLEs* are not only one of the most provided tools across institutions, but they are also used extensively within courses. Other tools both commonly provided across the sector and widely used across institutions are *Formative* and *Summative eAssessment tools*, *Text matching tools*, *Media streaming systems*, *Lecture capture technology*, *Reading list management software* and *Content management systems*. Notably, these tools are all focused on assessment and content delivery, with those tools that are more indicative of active learning approaches used in proportionally fewer courses across institutions.

Question 2.2: Does your institution <u>currently</u> outsource its <u>provision</u> of any services? Provision refers to an institutional service being hosted by another organisation.

Table 2.2 shows the proportion of institutions that currently outsource provision of any services, with the results also presented by institution type.

Outsourcing of services (Base: All respondents)	Total		Type					
			Pre-92		Post-92		Other	
	No.	%	No.	%	No.	%	No	%
	(57)		(30)		(24)		(3)	
Yes	41	72%	22	73%	18	75%	1	33%
No	16	28%	8	27%	6	25%	2	67%

Table 2.2 Institutional outsourcing of services.

The 2022 TEL Pulse Survey indicated that 93% of institutions were outsourcing the provision of specific TEL tools, compared to 83% in the 2020 survey. Table 2.2 highlights that the level of outsourcing was 72% in 2024, and while the variation is noted, it does indicate that the level of outsourcing of provision is still relatively high across the UK HE sector.

Question 2.3: The <u>provision</u> of which services are currently <u>outsourced</u>?

Outsourced services (Base: All respondents that outsource some provision)	Total		Type					
			Pre-92		Post-92		Other	
	No.	%	No.	%	No.	%	No.	%
	(41)		(22)		(18)		(1)	
Lecture capture platform	34	83%	19	86%	15	83%	0	0%
Digital repositories (e.g. Google Drive, Google Docs, Microsoft Office 365)	34	83%	19	86%	15	83%	0	0%
VLE platform – supporting the delivery of blended learning courses	33	80%	17	77%	15	83%	1	100%
VLE platform – supporting the delivery of fully online courses	33	80%	17	77%	15	83%	1	100%
Media streaming	33	80%	18	82%	15	83%	0	0%

Digital Assessment tools	30	73%	17	77%	13	72%	0	0%
Delivery platform – supporting short courses for CPD	29	71%	13	59%	15	83%	1	100%

Table 2.3 Institutional services that are currently outsourced - those above 70%.

Table 2.3 presents the services that are outsourced at more than 70% of responding institutions - for the full results, please see Tables A2.3a-c in the Appendix. *Lecture capture platform*, *Digital repositories*, *VLE platform – supporting the delivery of blended learning courses*, *VLE platform – supporting the delivery of fully online courses* and *Media streaming* are the top five tools reported as being outsourced. In the 2022 TEL Pulse Survey, four of these were also in the top five (except for *Digital repositories* which was 7th), while *Virtual classroom* has moved down from 5th in 2022 to 8th in 2024.

Five respondents provided details of other outsourced services, including two respondents indicating that Padlet was outsourced at their institution.

Question 2.4: How is the provision of these services currently outsourced?

How services are outsourced *(Row percentages shown, based on numbers in brackets)*	Institutionally-managed but hosted by a third party		Cloud-based Software as a Service (SaaS) multi-tenant service		Don't know	
Lecture capture platform (34)	5	15%	28	82%	1	3%
Digital repositories (e.g. Google Drive, Google Docs, Microsoft Office 365) (34)	5	15%	29	85%	0	0%
VLE platform – supporting the delivery of blended learning courses (33)	10	30%	23	70%	0	0%
VLE platform – supporting the delivery of fully online courses (33)	9	27%	24	73%	0	0%
Media streaming (33)	6	18%	27	82%	0	0%
Digital Assessment tools (30)	7	23%	23	77%	0	0%
Delivery platform – supporting short courses for CPD (29)	11	38%	17	59%	1	3%

Table 2.4 How services are currently outsourced.

Table 2.4 shows how the services presented in Table 2.3 are currently outsourced and highlights that Software as a Service (SaaS) was the method of delivery in at least 59% of responding institutions for each service. The only service with a more even spread of hosting methods was *VLE platform – supporting the delivery of open online courses* (Table A2.4a in the Appendix) where institutions reported institutional hosting and SaaS hosting each at 48%.

The same question was asked in the 2022 TEL Pulse Survey, and comparing results with the 2024 Survey, there is a notably higher percentage of institutions reporting that *e-Portfolio* and *Learning analytics* were delivered via SaaS in 2024, with increases of fifteen and 18 percentage points respectively. Additionally, just one service (*VLE platform – supporting the delivery of open online courses*) reports a lower proportion of institutions indicating the service was delivered via SaaS in 2024 (48%) compared to 2022 (67%), with an increase of 26 percentage points in the proportion indicating this service is institutionally managed.

Question 2.5: Which, if any, of the services that are currently outsourced are you considering bringing back in to be institutionally managed?

Table 2.5 highlights that 88% of respondents are not considering bringing any services back in-house, with only a small number of respondents indicating that they are considering bringing VLE platforms, platforms for CPD courses or *Learning analytics* back in-house. Tables A2.5b-c in the Appendix present this data by country and institution size, with Table A2.5c illustrating that none of the responding small institutions are considering taking a service back in-house.

Services being considered to bring back in to be institutionally managed (Base: All respondents that outsource some provision)	Total		Type					
			Pre-92		Post-92		Other	
	No.	%	Mean	Rank	Mean	Rank	Mean	Rank
	(41)		*(22)*		*(18)*		*(1)*	
None being considered for bringing back in-house	36	88%	86%	1	89%	1	100%	1
VLE platform – supporting the delivery of fully online courses	2	5%	5%	=3	6%	=2	0%	=2
Delivery platform – supporting short courses for CPD	2	5%	9%	2	0%	=5	0%	=2
VLE platform – supporting the delivery of blended learning courses	1	2%	0%	=5	6%	=2	0%	=2
VLE platform – supporting the delivery of open online courses	1	2%	5%	=3	0%	=5	0%	=2
Learning analytics	1	2%	0%	=5	6%	=2	0%	=2

Table 2.5 Services being considered to bring back in to be institutionally managed.

Question 2.6: Has your institution formally considered <u>collaboration with commercial partners</u> (e.g. Online Programme Management Services) on the design and delivery of courses or resources for professional development/CPD?

Table 2.6 illustrates that collaboration is something that institutions are giving attention to, with three-quarters indicating that they have considered it overall, with 42% reporting that they are actively collaborating.

Considered collaborations with commercial partners (Base: All respondents)	Total		Type					
			Pre-92		Post-92		Other	
	No.	%	%	Rank	%	Rank	%	Rank
	(57)		*(30)*		*(24)*		*(3)*	
Yes, and do collaborate	24	42%	47%	1	42%	1	0%	=2
Yes, under consideration	7	12%	13%	4	13%	=3	0%	=2
Yes, but decided not to	12	21%	20%	2	25%	2	0%	=2
No, have not considered	10	18%	17%	3	8%	5	100%	1
Don't know	4	7%	3%	5	13%	=3	0%	=2

Table 2.6 Considered collaboration with commercial partners.

Table 2.6 also illustrates a similar pattern of engagement in collaborations between Pre- and Post-92 institutions. Additionally, in terms of current collaborations, there is also a similar level of activity across institutions when considered by size; however, it is notable that more small institutions have not considered collaborations, compared to medium and large-sized universities (Table A2.6c in the Appendix).

Question 2.7: What do you collaborate/are you considering collaborating/did you consider collaborating on?

Delivery of *Fully online/distance learning programmes* (93%) was identified as the over-riding reason for universities to engage in collaboration (Table 2.7), and this was consistent across institution type, country and institution size (Tables A2.7a-c in the Appendix).

Collaborations on *Short Courses (e.g. LLE modules or CPD)* was the next most popular reason (37% overall) and was considered for collaboration more by Pre-92 and small institutions (Table A2.7c in the Appendix), while collaboration for the purpose of supporting *Degree apprenticeships* was only reported by 9% of responding institutions.

What institutions are considering collaborating/did consider collaborating on (Base: All respondents that have considered collaborating with commercial partners)	Total		Type					
			Pre-92		Post-92		Other	
	No.	%	%	Rank	%	Rank	%	Rank
	(43)		(24)		(19)		(0)	
Fully online/distance learning programmes	40	93%	88%	1	100%	1	0%	-
Short courses (e.g. LLE modules or CPD)	16	37%	46%	2	26%	2	0%	-
Design and delivery of open learning	9	21%	29%	3	11%	3	0%	-
Degree apprenticeships	4	9%	13%	4	5%	4	0%	-
Other	2	5%	8%	5	0%	5	0%	-

Table 2.7 What institutions collaborate/are considering collaborating/considered collaborating on.

Question 2.8: Has your institution undertaken a review of a major institutional digital education service or system in the last two years?

Reviews undertaken (Base: All respondents)	Total		Type					
			Pre-92		Post-92		Other	
	No.	%	No.	%	No.	%	No.	%
	(57)		(30)		(24)		(3)	
Yes	46	81%	27	90%	18	75%	1	33%
No	11	19%	3	10%	6	25%	2	67%

Table 2.8 Whether a review has been undertaken in the last two years.

Table 2.8, along with Tables A2.8a-c in the Appendix, illustrates that 81% of responding institutions, predominantly medium and large-sized, have conducted reviews in the last two years.

Question 2.9: Which major services or systems have been reviewed in the last two years?

Table 2.9a shows which major services or systems have been reviewed over the last two years, with the *VLE* (76%), *Polling tools* (59%), *e-Portfolio* (57%), *Lecture capture* (50%) and *Generative AI tools* (50%) forming the top five, followed by *Learning analytics* (41%), *Digital assessment* (37%) and *Digital skills assessment* (35%). The same top five services or systems are reflected within the reviews conducted by Pre-92 institutions, and this pattern is repeated in Post-92 institution reviews with the addition of *Learning analytics* which formed the subject of ten reviews.

Questions 2.9 and 2.10 consider the reviews that are being undertaken across the sector, with Table 2.9b illustrating that the number of reviews undertaken by the 46 responding institutions ranged from one to 18, with an average of just over six. There was little difference between the average number of reviews in Pre-92 (6.5) and Post-92 (6.3) institutions; however, there was a larger variation when considering institution size, with medium sized institutions (4.4) recording a lower mean than small (8.5) or large-sized institutions (7.5).

Services or systems reviewed	Total		Type					
(Base: All respondents that have undertaken a review)			Pre-92		Post-92		Other	
	No.	%	No.	%	No.	%	No.	%
	(46)		(27)		(18)		(1)	
VLE	35	76%	20	74%	14	78%	1	100%
Polling tools	27	59%	14	52%	12	67%	1	100%
e-Portfolio	26	57%	15	56%	10	56%	1	100%
Lecture capture	23	50%	13	48%	9	50%	1	100%
Generative Artificial Intelligence tools	23	50%	13	48%	10	56%	0	0%
Learning analytics	19	41%	8	30%	10	56%	1	100%
Digital Assessment (e.g. quizzes)	17	37%	10	37%	7	39%	0	0%
Digital Skills assessment	16	35%	12	44%	4	22%	0	0%
Digital exams system	14	30%	9	33%	5	28%	0	0%
Digital accessibility tools	14	30%	9	33%	5	28%	0	0%
Electronic Management of Assignments (EMA)	12	26%	9	33%	3	17%	0	0%
Media streaming	12	26%	8	30%	4	22%	0	0%
Webinar platform	12	26%	6	22%	5	28%	1	100%
Collaborative tools	12	26%	7	26%	5	28%	0	0%
Digital Skills tools	10	22%	8	30%	2	11%	0	0%
Proctoring software	9	20%	5	19%	4	22%	0	0%
Podcasting	7	15%	4	15%	3	17%	0	0%
Other service or system	7	15%	5	19%	2	11%	0	0%

Table 2.9a Services or systems reviewed.

Number of reviews (Base: All respondents undertaking a review)	Frequency of institutions	Percent
1	1	2%
2	1	2%
3	10	22%
4	9	20%
5	4	9%
6	8	17%
7	1	2%
8	1	2%
9	2	4%
10	2	4%
11	1	2%
12	2	4%
17	2	4%
18	2	4%

Table 2.9b Number of reviews being undertaken by institutions.

Question 2.10: What was the outcome of the review on these services or systems?

Question 2.9 highlighted that reviews of the *VLE*, *Polling tools*, *e-Portfolio*, *Lecture capture*, and *Generative AI tools* were the most prevalent, with more than 20 institutions undertaking reviews for each of these services or systems. Table 2.10 displays the outcomes of these reviews, and highlights that, for the VLE, continuing with (23%) or upgrading (51%) the existing system were the most common outcomes. Polling tools saw the greatest shift to a new system (48%), although there were also indications of this with Generative AI (41%), while the outcomes of reviews of e-Portfolios were more evenly distributed.

When considering the outcome of reviews by institution type (Tables A2.10aa-qa in the Appendix) the most popular outcome for Post-92 institutions was to *Continue with the current system* (twelve tools), while for Pre-92 institutions it was evenly divided between *Review still in progress* and *Implementation/pilot of new system* and each were outcomes of the reviews of ten tools (note some tools were equally ranked).

When considering the size of institutions, the data indicates that medium and large-sized institutions are more likely to implement a new system or undertake a pilot, with the reviews leading to the *Implementation/pilot of new system* for seven tools for small-sized institutions, 19 tools for medium-sized institutions and 41 tools for large-sized institutions.

Outcome of reviews *(Row percentages shown, based on numbers in brackets)*	Still in progress	Continue with current system	Implementation/pilot of new system	Upgrade current system	Move to external hosting for current system	Other
VLE (35)	11%	23%	9%	51%	6%	0%
Polling tools (27)	22%	19%	48%	4%	0%	7%
e-Portfolio (24)	33%	25%	13%	13%	4%	13%
Lecture capture (23)	26%	43%	13%	0%	17%	0%
Generative Artificial Intelligence tools (22)	45%	9%	41%	0%	0%	5%
Learning analytics (18)	33%	28%	22%	6%	0%	11%
Digital Assessment (e.g. quizzes) (16)	31%	31%	25%	6%	0%	6%
Digital Skills assessment (14)	29%	21%	36%	0%	0%	14%
Digital exams system (12)	42%	17%	25%	17%	0%	0%
Digital accessibility tools (13)	23%	38%	23%	15%	0%	0%

Table 2.10 Summary of outcomes of the top ten reviewed services or systems.

Question 2.11: Which, if any, of the following digital education tools are you planning on implementing or piloting on a <u>centrally-supported</u> basis over the <u>next two years</u> to add to those already available?

Table 2.11 shows the 16 most popular digital education tools that institutions are planning to implement or pilot over the next two years on a centrally-supported basis, and these are also presented by institution type. Tables A2.11a-c in the Appendix provide the full data with the breakdowns presented by institution type, country and size of institution.

Centrally-supported digital education tools to be implemented or piloted over next 2 years (Base: All respondents)	Total		Type					
			Pre-92		Post-92		Other	
	%	Rank	%	Rank	%	Rank	%	Rank
	(57)		(30)		(24)		(3)	
Generative AI	28	49%	53%	1	46%	1	33%	=3
Digital Exams system	14	25%	30%	2	21%	3	0%	=14
e-Portfolio	12	21%	17%	=10	25%	2	33%	=3
Learning analytics tools	11	19%	17%	=10	17%	=4	67%	=1
Summative eAssessment tools	11	19%	23%	=3	13%	=11	33%	=3
Other centrally supported TEL tool	11	19%	23%	=3	17%	=4	0%	=14
Collaborative tools	10	18%	23%	=3	8%	=15	33%	=3
Electronic Management of Assignments (EMA)	10	18%	23%	=3	13%	=11	0%	=14
Webinar/virtual classroom	10	18%	17%	=10	17%	=4	33%	=3
Personal response systems (including handsets or web-based apps) (e.g. Mentimeter, Poll Everywhere, TurningPoint/ PointSolutions, Vevox)	9	16%	20%	=7	13%	=11	0%	=14
Formative eAssessment tools	9	16%	20%	=7	8%	=15	33%	=3
Proctoring software	8	14%	13%	=13	17%	=4	0%	=14
Hybrid delivery technologies	8	14%	20%	=7	4%	=21	33%	=3
Academic skills/writing	7	12%	7%	=17	17%	=4	33%	=3
Digital Skills courses	6	11%	13%	=13	4%	=21	33%	=3
Lecture capture tools	6	11%	7%	=17	17%	=4	0%	=14

Table 2.11 Top 16 digital education tools institutions are planning on implementing or piloting on a centrally-supported basis over the next two years.

The use of *Generative AI* is the leading digital tool that will be piloted or implemented over the next two years, and it is the top-ranked tool in both Pre- and Post-92 institutions and across all countries. *Digital exam systems* are also ranked in the top three for both Pre- and Post-92 institutions, for all countries except for Wales, and for medium and large-sized institutions.

Overall, 19% of respondents identified *Other centrally supported TEL tools*, and these include module evaluation, curriculum management systems, interactive course authoring tools and digital badges.

Question 2.12: What steps, if any, is your institution taking to engage with generative Artificial Intelligence to support teaching and learning activities?

Table 2.12 displays the steps that institutions are taking to engage with Generative AI and illustrates that only one Pre-92 institution indicated that they have not taken any action. Overall, 70% of respondents reported that they are developing training provision and more than 80% are setting up a working group and updating guidance on the responsible use of AI for both staff and students.

Steps institutions are taking to engage with Gen AI	Total		Type					
			Pre-92		Post-92		Other	
(Base: All respondents)			%	Rank	%	Rank	%	Rank
	(57)		(30)		(24)		(3)	
Developed/updated guidance on responsible use of AI	51	89%	90%	1	96%	1	33%	=3
Working group set up to look at this	47	82%	87%	2	83%	2	33%	=3
Developed/implemented training on GenAI	40	70%	73%	3	71%	3	33%	=3
Developed/updated policy on responsible use of AI	37	65%	70%	4	58%	4	67%	=1
Are piloting AI tools with restricted access to some staff/students	28	49%	53%	5	50%	5	0%	=7
Surveying staff/students about use or experiences of GenAI	26	46%	47%	6	42%	6	67%	=1
Licensed AI tools and offering as a centrally supported service	16	28%	30%	7	25%	7	33%	=3
Other	10	18%	20%	8	17%	8	0%	=7
No action taken	1	2%	3%	9	0%	9	0%	=7

Table 2.12 Steps taken to engage with generative Artificial Intelligence to support teaching and learning activities.

Table 2.12 shows that there is a similar pattern of engagement with Generative AI between Pre- and Post-92 institutions, with both institution types commonly developing or updating guidance on the responsible use of GenAI tools and establishing working groups to look at GenAI developments. Medium and large-sized institutions appear to have made greater progress in developing guidance and implementing training on GenAI than small institutions (Table A2.12c in the Appendix), which may relate to the specific disciplines that they teach and the relative impact that GenAI developments are having on their course delivery.

Overall, 18% of responding institutions identified *Other* steps, including student events to raise awareness, developing case studies of local practice and running assessment hackathons to look at assessment design and teaching approaches to develop critical AI literacies.

Section Summary

This section of the Survey invited respondents to report on the range of technology enhanced learning tools currently in use within their institution, how they were provided and kept under review.

In general, the most used centrally-supported tools were *Virtual learning environments (VLEs)*, *Content management systems*, *Document sharing tools*, *Webinar/virtual classroom tools*, *Formative* and *Summative eAssessment* tools, *Collaborative tools*, *Media streaming systems* and *Text matching tools*, and they were each provided in at least 95% of responding institutions. A comparison with data from Section 3 highlights that high levels of central provision does not generally equate to high levels of use except for *VLEs* and *Text matching tools*, with those tools focused on content delivery and assessment more widely used across institutions. *Generative AI*, as a new development, is centrally provided by 49% of institutions.

Overall, 72% of institutions are outsourcing provision, with *Lecture capture platforms*, *Digital repositories*, the *VLE* and *Media streaming* the most common services, and almost 90% of institutions indicated that they are not considering bringing outsourced provision back in-house.

Collaboration with commercial partners is in place at 42% of responding institutions, while 33% have considered or are considering such collaborations, with fully online/distance learning programmes the main focus for such endeavours.

TEL tools continue to be regularly reviewed, with 81% of respondents undertaking a review in the last two years, and an average of six reviews per institution. The *VLE*, *Polling tools*, *e-Portfolio*, *Lecture capture* and *Generative AI* were the most reviewed tools or services, and the reviews were most likely to lead to continuing with the existing tool or upgrading it, with reviews of *Polling tools* and *Generative AI* the most likely to implement or pilot a new system.

Looking at potential new tools *Generative AI* was the most likely to be implemented or piloted over the next two years, followed by *Digital Exams systems*, *Learning analytics* and *e-Portfolios*.

Following the rapid developments in Generative AI provision, 89% of institutions have developed guidance, 82% have established a working group and 70% were providing training, while a policy was in place at 65% of institutions.

Section 3: Course Delivery and Evaluation of Digital Education

This section of the report looks at how digital education is being delivered across institutions and how that use is being monitored and evaluated. The questions seek to understand the delivery modes in use, how flexible delivery is supported and what tools are being most used across courses. Additionally, the questions aim to explore the extent to which the use of digital education is monitored, in terms of usage data and levels of digital capability plus what evaluation of impact is undertaken by institutions.

Question 3.1: Does your institution offer any of the following types of programmes or courses?

For this question respondents were asked the extent to which different modes of delivery of programmes or courses were provided across the institution. The different modes of delivery are:

- Blended learning degree programmes: lecture notes and supplementary resources for programmes studied in class are available online
- Active Blended learning degree programmes: parts of the programme are studied in class and other parts require students to engage in active learning online (e.g. engaging in collaborative or assessed tasks)
- Hybrid/HyFlex degree programmes: the programme enables students to attend live classes either in person or online
- Active blended credit bearing short courses (e.g. Lifelong Learning Entitlement 30 credit modules)
- Active blended non-credit-bearing short courses
- Fully online degree programmes
- Fully online credit bearing short courses (e.g. LLE 30 credit modules)
- Fully online non-credit bearing short courses (e.g. professional CPD courses)
- Fully online pre-induction courses
- Open online learning courses for all students at your institution (internal access only)
- Open online boundary courses: free external access to the course materials for the public, but assessment restricted to students registered at your institution only
- Open online learning courses for public (free external access)

The options against which they could respond for each mode of delivery were:

1. Yes, extensively across the institutions
2. Yes, across some Schools/departments
3. Yes, by some individual teachers
4. Not yet, but we are planning to
5. Not offered and no plans to do so
6. Don't know/not applicable

Table 3.1 highlights that supplementary *Blended learning* is the most used mode of delivery, with 78% of respondents indicating extensive use across their institution. This was followed by *Active Blended,* although this was some way behind and was offered extensively across 29% of responding institutions. Overall, *Active blended learning* is a mode of delivery used across 95% of institutions, but only extensively across 29% of responding institutions, across Schools at 38% of institutions and by individuals at 28% of responding institutions.

Fully online degree programmes are provided in some form (extensively, across schools or by individuals) at 81% of responding institutions, with extensive provision accounting for 11%.

Table 3.1 also highlights that having different modes of delivery can be dependent on individuals or local context. *Hybrid/Hyflex*, *Active blended credit bearing short courses*, *Active blended non-credit bearing short courses*, *Fully online credit bearing short courses*, *Fully online non-credit bearing short courses*, *Fully online pre-induction courses* and *Open online boundary courses* are all identified as more commonly delivered by some individual teachers.

Courses offered at responding institutions *(Row percentages shown, based on numbers in brackets)*	Yes, extensive	Yes, Schools	Yes, individual	Not yet	Not offered	Don't know
Blended Learning (58)	78%	12%	7%	0%	3%	0%
Active Blended (58)	29%	38%	28%	2%	3%	0%
Hybrid/Hyflex (58)	3%	9%	41%	10%	36%	0%
Active blended – credit bearing short courses (58)	2%	9%	24%	21%	33%	12%
Active blended -credit bearing short courses (57)	4%	19%	33%	11%	26%	7%
Fully online degree (57)	11%	40%	30%	9%	9%	2%
Fully online credit bearing short courses (58)	3%	12%	26%	17%	31%	10%
Fully online non-credit bearing short courses (58)	7%	28%	41%	9%	12%	3%
Fully online pre-induction courses (58)	16%	17%	24%	19%	19%	5%
Open online courses – internal access (58)	24%	5%	21%	14%	34%	2%
Open online boundary courses (58)	0%	3%	16%	12%	60%	9%
Open online learning -free external access (57)	11%	11%	16%	12%	47%	4%

Table 3.1 Programmes or courses offered at responding institutions.

Hybrid/Hyflex delivery is also shown to be dependent on individual teachers (41%) and was used extensively across just 3% of institutions and 9% at School level. In contrast, just over one-third of respondents indicated that *Hybrid/Hyflex* delivery was not offered at their institution.

Question 3.2: How, if at all, is your institution using technology to offer greater flexibility through hybrid/hyflex in learning and teaching activities? e.g. supporting remote and physically 'present' students for <u>campus-based programmes</u>.

Overall, 41% of respondents indicated that they offered no flexibility through hybrid/hyflex delivery, while 36% indicated they offered a combination of in-person and remote teaching sessions, with small institutions (Table A3.2c in the Appendix) more likely to offer this (58%). Overall, just 9% of responding institutions offered students a choice about attending teaching sessions, either physically or virtually, with 9% also indicating they offered students a choice about whether to participate synchronously or asynchronously in teaching sessions, and these figures were largely consistent across both the size and type of institution.

Use of technology to offer flexibility (Base: All respondents)	Total		Type					
			Pre-92		Post-92		Other	
	No.	%	No.	%	No.	%	No.	%
	(58)		(30)		(25)		(3)	
No flexibility offered	24	41%	13	43%	9	36%	2	67%
Offering a combination of in-person and remote teaching sessions (hybrid learning)	21	36%	9	30%	11	44%	1	33%
Other	11	19%	8	27%	3	12%	0	0%
Student choice over physical (in person) or remote attendance in teaching sessions	5	9%	2	7%	3	12%	0	0%
Student choice over real-time or asynchronous participation in teaching sessions	5	9%	3	10%	2	8%	0	0%
Offering a personalised learning pathway	2	3%	0	0%	2	8%	0	0%

Table 3.2 Use of technology to offer flexibility through hybrid/hyflex in learning and teaching activities.

Question 3.3: Does the institution measure the _use_ of TEL tools across the institution, looking for any variation in take-up by course type, subject or other relevant factors?

More than half of responding institutions (57%) measure the use of TEL tools, with Welsh institutions (Table A3.3b in the Appendix) less likely to do so (one out of the four responding institutions), while medium-size institutions (65%) were more likely (Table A3.3c in the Appendix).

Measurement of the use of TEL tools (Base: All respondents)	Total		Type					
			Pre-92		Post-92		Other	
	No.	%	No.	%	No.	%	No.	%
	(58)		(30)		(25)		(3)	
Yes	33	57%	19	63%	14	56%	0	0%
No	25	43%	11	37%	11	44%	3	100%

Table 3.3 Institutional measurement of the use of TEL tools.

Respondents were also asked to identify the methods used to measure the use of TEL tools, and 33 provided the detail, with some institutions indicating they used more than one approach. A typical response was:

> "_Based on a range of different data e.g. engagement in the key TEL tools e.g. Moodle, Panopto, adoption and usage of the VLE Template based on the Digital Learning Pedagogy Framework. This is then fed into Power BI._"

Question 3.4: _How_ do you measure the _use_ of TEL tools? What systems do you use to do this and what data is collected?

Table 3.4 shows the different approaches identified by respondents, with reports from system tools the most popular (73%), and other measures included the use of data analytics tools, surveys, audits and the use of student engagement data.

Measurement of TEL tools	Total	
(Base: All respondents indicating that they measure the use of TEL tools)	No.	%
	(33)	
Reports from system tools	24	73%
Use data analytics tools to process	6	18%
Data broken down by e.g. department	6	18%
User surveys	5	15%
Audits of VLE	4	12%
Combined Student engagement data	3	9%
Reports from in-class tools	2	6%

Table 3.4 The methods, systems and data used to measure the use of TEL tools.

Question 3.5 And what <u>use</u> is made of the resultant data?

Respondents were also asked to indicate how the data was used, and Table 3.5 provides the detail. The most popular uses of the data were its inclusion in School/departmental reports and informing strategic planning, which were each used by nine institutions (28%). Overall, one-quarter of responding institutions indicated that the data was actively used to change or target the training offer provided, while 19% indicated they used the data to provide evidence of value for money/procurement.

Use made of data	Total	
(Base: All respondents indicating that they measure the use of TEL tools)	No.	%
	(32)	
Reports to Schools/departments	9	28%
Strategic planning e.g. student engagement, digital transformation	9	28%
Used to change or target training offer	8	25%
Value for money/procurement	6	19%
None yet	5	16%
Discussed at committees	1	3%
External reporting e.g. TEF	1	3%

Table 3.5 How the collected data is used.

Question 3.6a: Does the institution measure the <u>development of Digital Capability Skills</u> among students?

Overall, almost 40% of responding institutions were not measuring the development of student digital capability skills, while 34% reported they were working towards it and 28% indicated that it was measured. Generally, there were no clear patterns when we consider the country or size of responding institutions (Tables A3.6ab-ac in the Appendix); however, Post-92 institutions (52%) were more likely to be working towards measuring the development of student digital capability skills (Table 3.6a) than Pre-92 institutions (20%).

Measurement of the development of Digital Capability Skills among students	Total		Type					
			Pre-92		Post-92		Other	
(Base: All respondents)	No.	%	No.	%	No.	%	No.	%
	(58)		(30)		(25)		(3)	
No	22	38%	13	43%	7	28%	2	67%
No, but working towards this	20	34%	6	20%	13	52%	1	33%

| Yes | 16 | 28% | 11 | 37% | 5 | 20% | 0 | 0% |

Table 3.6a Measurement of the development of Digital Capability Skills among students.

Question 3.6b: Does the institution measure the _development of Digital Capability Skills among staff?_

The number of institutions measuring the development of staff digital capabilities was slightly lower (Table 3.6b) than those measuring the development of student digital capability, with only 26% measuring it, 29% reporting they do not measure it, and 45% indicating they are working towards it. As with student capabilities, there are differences between the types of institution, with 56% of Post-92 institutions indicating that they are working towards measuring the development of staff digital capabilities, compared to 37% of Pre-92 institutions.

Measurement of the development of Digital Capability Skills among staff *(Base: All respondents)*	Total		Type					
			Pre-92		Post-92		Other	
	No.	%	No.	%	No.	%	No.	%
	(58)		*(30)*		*(25)*		*(3)*	
No, but working towards this	26	45%	11	37%	14	56%	1	33%
No	17	29%	9	30%	6	24%	2	67%
Yes	15	26%	10	33%	5	20%	0	0%

Table 3.6b Measurement of the development of Digital Capability Skills among staff.

Question 3.7: _How_ do you measure the _development of Digital Capability Skills?_ What systems do you use to do this and what data is collected (e.g. Jisc Digital Discovery Tool)?

Overall, 17 responding institutions provided detail on how they measure the development of digital capability skills, with all indicating they used a self-assessment tool, including fourteen (82%) noting this was the Jisc Discovery Tool and three (18%) indicating they use an in-house tool. The responses highlighted a range of levels of application of the self-assessment tools, with some indicating the Jisc Discovery Tool was available to staff and students, several noting it was just for students and others indicating it was still in the pilot stage, suggesting that there is no widespread measurement of the development of Digital Capability skills across the sector.

How Digital Skills Development is measured *(Base: All respondents indicating that they measure Digital Capabilities Skills for staff or students)*	Total	
	No.	%
	(17)	
Self-assessment tool	17	100%
[Jisc Discovery tool]	[14]	[82%]
[In house assessment tool]	[3]	[18%]
Programme assessment	1	6%
Jisc Digital Insights	1	6%
Linked In Learning data	1	6%

Table 3.7 How Digital Capability Skills are measured and the systems used.

Question 3.8: And what _use_ is made of the resultant data?

Overall, 16 responding institutions provided detail on the use of the resultant data, with 63% indicating it was used to inform future training (Table 3.8), as would be expected in reflective educational practice. Additionally, one-quarter of respondents noted the data was used to inform reports and 19% indicated it was used for targeted interventions while just two institutions (13%) confirmed that the data was not used.

Use made of data	Total	
(Base: All respondents indicating that they measure Digital Capabilities Skills for staff or students)	No.	%
	(16)	
To inform future training	10	63%
Reports to committees/schools/departments	4	25%
Creating targeted interventions based on groups	3	19%
None	2	13%
Strategic planning e.g. Student Experience or Digital transformations	1	6%
Badge	1	6%

Table 3.8 How the collected data is used.

Question 3.9 Approximately, what proportion of courses within your institution use each of the following TEL tools?

This question explored the extent of TEL tool usage in courses across an institution, with the options including both TEL and digital capability related tools. Table 3.9 captures the leading digital education tools used by institutions, and the top ten tools presented in the table are those with the highest proportion of usage in 50% or more of courses. Data for this question requires some circumspection, as the results are estimates of the proportion of courses using these tools at responding institutions.

Top ten tools	Proportion of courses						
(Row percentages shown, based on 58 respondents)	100%	75% - 99%	50% - 74%	25% - 49%	1% - 24%	0%	Don't Know
VLE	79%	19%	0%	2%	0%	0%	0%
Text matching tools	26%	55%	12%	2%	3%	2%	0%
Reading list management tools	21%	53%	5%	7%	2%	10%	2%
Content management system tools	53%	21%	2%	10%	10%	0%	3%
Electronic Management of Assignments tools	33%	40%	3%	2%	0%	12%	10%
Lecture capture tools	17%	41%	17%	14%	9%	0%	2%
Accessibility tools	28%	29%	12%	3%	5%	7%	16%
Digital/learning repository tools	41%	19%	3%	0%	10%	9%	17%
Media streaming tools	12%	29%	22%	16%	9%	5%	7%
Formative eAssessment tools	5%	24%	33%	16%	12%	0%	10%

Table 3.9 Percentage of courses using TEL tools - top ten.

Comparing results for this question with the 2020 Survey, a common set of tools was listed with the top three the same in 2020 and 2024 (Table 3.9). *Accessibility tools* were not an option in previous surveys, and so no direct comparisons can be made; however, it was reported in Table 1.1 (page 7) that *Improving the accessibility of learning for all students* is the fourth most cited factor driving digital education.

The full tables for the proportion of courses using each type of tools presented by type of institution, country and size of institution are provided in the Appendix (Tables A3.9aa-adc).

Question 3.10: Has the institution evaluated the impact of digital education on the student learning experience across the institution as a whole over the past two years?

Evaluations have been undertaken over the past two years by more than 70% of institutions, 52% at institutional level and 21% at individual department/school level. Table 3.10 shows similar levels of evaluation activity between Pre- and Post-92 institutions. There was greater variation when considering the size of institutions, with Table A3.10c in the Appendix illustrating that institutional level evaluations were more prevalent in small institutions (67%), compared to medium (48%) and large-sized institutions (48%). Evaluations by individual departments/schools were more prevalent in large institutions (35%), while medium-sized institutions recorded a greater proportion not undertaking any evaluation (39%).

Whether evaluated the impact of digital education on the student learning experience (Base: All respondents)	Total		Type					
			Pre-92		Post-92		Other	
			%	Rank	%	Rank	%	Rank
	(58)		(30)		(25)		(3)	
Yes	30	52%	57%	1	52%	1	0%	3
No institutional evaluation, but individual departments/schools have evaluated	12	21%	17%	3	24%	=2	33%	2
No evaluation	16	28%	27%	2	24%	=2	67%	1

Table 3.10 Evaluation of the impact of digital education on the student learning experience across the institution over the past two years.

Question 3.11: What aspects of the impact of digital education on the student learning experience have been evaluated over the past two years?

Accessibility of learning and teaching resources was the most common aspect of digital education undertaking an evaluation, by both institution type and size (Table 3.11; Tables A3.11a-c in the Appendix). A *General review of digital education services* was ranked second, followed by *Effectiveness of blended/online learning*, *Use of Generative Artificial Intelligence* and *Use of learning analytics in supporting students*. However, there were some variations across institution types and sizes, with evaluation of the *Use of Generative Artificial Intelligence* more common in Post-92 institutions (54%), than in Pre-92 institutions (29%). Additionally, evaluation of *Generative Artificial Intelligence* was more common in medium-sized institutions (55%) (Table 3.11c in the Appendix), while the evaluation of the *Use of learning analytics in supporting students* was more common in Post-92 institutions (54%) than in Pre-92 institutions (24%).

Evaluated aspects of student learning experience (Base: All respondents that have evaluated impact)	Total		Type					
			Pre-92		Post-92		Other	
			%	Rank	%	Rank	%	Rank
	(30)		(17)		(13)		(0)	
Accessibility of learning and teaching resources	19	63%	59%	1	69%	1	0%	-
General review of digital education services	16	53%	53%	2	54%	=2	0%	-
Effectiveness of blended/online learning	12	40%	41%	3	39%	=5	0%	-
Use of generative Artificial Intelligence	12	40%	29%	=6	54%	=2	0%	-
Use of learning analytics in supporting students	11	37%	24%	=8	54%	=2	0%	-
Take up/usage/adoption by students of lecture capture	9	30%	35%	=4	23%	8	0%	-
Student digital fluency/capability	9	30%	24%	=8	38%	=5	0%	-
eAssessment	8	27%	35%	=4	15%	9	0%	-
Electronic Management of Assignments (EMA)	6	20%	12%	10	31%	7	0%	-

Other aspects	6	20%	29%	=6	8%	10	0%	-

Table 3.11 Aspects of the impact of digital education on the student learning experience that have been evaluated over the past two years.

Overall, six respondents provided details on other aspects of the student learning experience that were evaluated, and these include a Student Engagement Dashboard, VLE course templates, a VLE review and the roll out of Digital Core Essentials, a general review using the Jisc Digital Experience Insights Survey, pulse surveys on the ease of accessing learning resources and teaching materials, and a Health and Care Digital Capabilities Framework, Career readiness gain, digital readiness and capability survey.

Section Summary

This section of the report looked at how digital education is being delivered across institutions and how that use is monitored and evaluated.

Blended learning, as supplementary resources to on-campus provision, remains the most widespread use of digital education across UK universities. *Active Blended learning* and *Fully Online degree programmes* are provided more on a local, school/department basis than across the institution. *Hybrid/Hyflex* learning is provided by just over half of institutions but how it is offered is variable with data indicating local rather than central decision-making on provision.

The most popular tools used across courses were the *VLE*, *Text matching tools*, *Reading list management tools*, *Content management systems*, *EMA*, *Lecture capture*, *Accessibility tools* and *Digital/learning repositories*, with these tools all used by most courses at more than half of responding institutions.

Monitoring and evaluation of digital education, both of TEL tools and digital capabilities is not undertaken systematically across UK universities. Overall, 57% of institutions measure the use of TEL tools, predominantly through reports from the tools themselves. Digital capabilities of students are measured in only 28% of institutions and for staff it is only 26%. Evaluation of the impact of digital education was undertaken by 52% of respondents with a focus on the accessibility of resources and a general review of digital education services.

Section 4: Enabling Digitally Capable Students and Staff

This section focused on how staff and student digital capabilities are developed as part of an institutional approach to digital education provision. Respondents were encouraged to consult with colleagues across their institution including library, HR, Learning and Teaching leads, IT training, disability support and student services.

Question 4.1: How does your institution identify digital capability _training and development needs_ of students or staff?

Tables 4.1a-b show the methods used to identify digital capability training needs for students and staff. The highest-ranking method for both students and staff is through discussion (48% students (tutorials), 79% staff (line manager meetings)).

Anytime self-assessment (e.g. Jisc Discovery Tool) has become more popular as a way of identifying students' digital capabilities, with 42% using this method compared to 33% indicating they used the Jisc Discovery Tool to identify students' digital capabilities in 2019. The percentage was slightly higher for staff, with half of responding institutions confirming they used _Anytime self-assessment_ to identify staff digital capability training needs.

Notably, a low number of institutions do not identify training and development needs (13% students, 4% staff) which is perhaps surprising given the importance of digital capabilities in supporting study and employment. A _Formal assessment of digital capabilities upon entry/induction_ is undertaken for staff at just one responding institution (2%) and for students at around one in ten institutions – in line with the 12% of institutions reporting that this assessment was undertaken for students in the Digital Capabilities Report in 2019.

Tables A4.1a-A4.1f in the Appendix present the data by institution type, country and size of institution.

How institutions identify digital capability training needs: students (Base: All respondents)	Total		Type					
			Pre-92		Post-92		Other	
	No.	%	No.	%	No.	%	No.	%
	(52)		(26)		(24)		(2)	
Through discussions in tutorials/line manager meetings	25	48%	14	54%	10	42%	1	50%
Anytime self-assessment of digital capabilities (e.g. via Jisc Digital Capability Discovery Tool)	22	42%	10	38%	12	50%	0	0%
Via analysis of helpdesk support requests	22	42%	10	38%	11	46%	1	50%
As part of implementing new system/service or process/policy	21	40%	9	35%	11	46%	1	50%
Via survey to all staff/students (e.g. Jisc Digital Experience Insights)	19	37%	9	35%	10	42%	0	0%
Other method	8	15%	5	19%	3	13%	0	0%
Do not identify training and development needs	7	13%	3	12%	3	13%	1	50%
Formal assessment of digital capabilities upon entry/induction	5	10%	2	8%	3	13%	0	0%

Table 4.1a: How institutions identify digital capability training and development needs of students.

How identify digital capability training needs: staff (Base: All respondents)	Total		Type					
			Pre-92		Post-92		Other	
	No.	%	No.	%	No.	%	No.	%
	(52)		*(26)*		*(24)*		*(2)*	
Through discussions in tutorials/line manager meetings	41	79%	22	85%	18	75%	1	50%
As part of implementing new system/service or process/policy	35	67%	19	73%	15	63%	1	50%
Via analysis of helpdesk support requests	33	63%	18	69%	14	58%	1	50%
Anytime self-assessment of digital capabilities (e.g. via Jisc Digital Capability Discovery Tool)	26	50%	14	54%	12	50%	0	0%
Via survey to all staff/students (e.g. Jisc Digital Experience Insights)	21	40%	10	38%	11	46%	0	0%
Other method	15	29%	7	27%	8	33%	0	0%
Do not identify training and development needs	2	4%	0	0%	1	4%	1	50%
Formal assessment of digital capabilities upon entry/induction	1	2%	0	0%	1	4%	0	0%

Table 4.1b How institutions identify digital capability training and development needs of staff.

Question 4.2 Which departments take the lead in helping students or staff develop their digital capabilities and what methods do they use?

Table 4.2 presents those methods where departments at responding institutions were identified as taking the lead, and highlights that the digital education team or equivalent, along with the library and IT services, often take the lead in developing staff and students' digital capabilities. The table only shows the responses where the number of overall responses per method totaled greater than 100.

The Digital Education Team largely provides optional in-person (79%) and optional online training (81%) and also leads on drop-in clinics and appointments (75%) with the library also contributing (59%). The embedding of digital capabilities in the curriculum continues to grow and is more often provided by academic schools, the library and study skills services. They also deliver skills relating to their course and assignments, supporting the idea of just-in-time training with digital capabilities often taught when most relevant and relating to a specific topic.

Some of the data is expected, such as IT services providing helpdesk support, while less expected is the range of departments providing drop-in support as one of their key methods of delivery, including disability services. These services are student-facing and offer regular drop-in sessions as a legacy which may include digital capabilities as one aspect of the provision.

When considering the size, country and type of institution there is generally little difference between the methods and services (Tables A4.2aa-A4.2ic in the Appendix). However, Table A4.2ac in the Appendix highlights that small institutions often rely more heavily on academic and study skills departments (83%) for the embedding of digital capabilities in the curriculum, while medium-size institutions are more likely to use the library (67%) and large institutions are most reliant on academic departments and schools (60%).

Notably, size is often more of a factor than type of institution in which service leads digital capabilities support and full details are provided in the Appendix (Tables A4.2aa-A4.2ic).

Table 4.2 data:

Lead departments (Row percentages shown, based on numbers in brackets)	Academic Development	Department/School	Library	IT Services	Digital Education team or	Disability Support	equivalent	Employability/ careers service	Student Support	Academic		Other
For Students												
Embedded throughout teaching/curriculum (53)			57%	13%	53%	15%	42%	30%	9%	58%	15%	6%
Training in specific aspects of digital capabilities as required by the course (54)			50%	19%	41%	15%	46%	9%	4%	54%	6%	7%
For staff or students												
Optional in-person sign-up training (57)			63%	46%	44%	18%	79%	25%	5%	26%	28%	11%
Optional online training (57)			56%	54%	40%	12%	81%	18%	7%	19%	28%	16%
Webinars (49)			35%	29%	20%	10%	78%	20%	6%	12%	24%	12%
Helpdesk (53)			47%	87%	13%	13%	53%	9%	8%	4%	9%	4%
Drop-in clinics or appointments (56)			59%	38%	32%	20%	75%	27%	9%	7%	11%	7%
Online resources (e.g. YouTube, LinkedIn, Vimeo, blogs, webpages etc.) (52)			58%	54%	31%	17%	81%	21%	8%	10%	15%	6%
Internal comms e.g. announcements. E-mails, login screens (53)			36%	57%	25%	13%	66%	21%	6%	6%	21%	11%

Table 4.2 The departments taking lead on staff or students' digital capabilities development and the methods used.

Question 4.4: And how is <u>achievement</u>, in respect of student or staff digital capabilities, recognised?

Surprisingly, almost one third of responding institutions do not recognise student achievement of digital capabilities, and in small institutions this was 50% (Table A4.4ac in the Appendix). Overall, one third of responding institutions offered *Certificate or extracurricular options (not-credit bearing)*, and this was just 17% at small institutions compared to 43% at large institutions. Additionally, Table 4.4a highlights that *Certificate or extracurricular options (not credit bearing)* were generally offered more at Pre-92 institutions (47%). *Digital champion* roles were only available at 28% of responding institutions, and half of the options received six or fewer responses, showing the lack of recognition of achievements for students' digital capabilities, which is surprising given the importance of this for employability.

There were more ways to recognise staff achievements in digital capabilities compared to those of students, with only 21% of institutions indicating that staff achievement was not recognised (Table 4.4b). Generally, the most popular ways of recognising achievements focus on individual awards, rather than methods that touch on a wider group of staff, with only 22% offering *Certificates or extracurricular options (not credit bearing)* that would be open to all. Additionally, one institution noted that staff achievements were recognised during the appraisals process.

How recognise achievement: students (Base: All respondents)	Total		Type					
			Pre-92		Post-92		Other	
	No.	%	No.	%	No.	%	No.	%
	(58)		(30)		(25)		(3)	
Certificate/extracurricular options (not credit bearing)	19	33%	14	47%	5	20%	0	0%
None of the above - achievement is not recognised	18	31%	9	30%	6	24%	3	100%
Open or digital badges	17	29%	10	33%	7	28%	0	0%
Digital/champions/ambassadors	16	28%	9	30%	7	28%	0	0%
Award schemes (students)	11	19%	7	23%	4	16%	0	0%

Table 4.4a How achievement is recognised in respect of students' digital capabilities (top five).

How recognise achievement: staff (Base: All respondents)	Total		Type					
			Pre-92		Post-92		Other	
	No.	%	No.	%	No.	%	No.	%
	(58)		(30)		(25)		(3)	
Recognition/acknowledgement (nomination for teaching awards)	31	53%	18	60%	12	48%	1	33%
Digital/champions/ambassadors	21	36%	10	33%	11	44%	0	0%
External certification e.g. MS Office Specialist (MOS)	18	31%	10	33%	7	28%	1	33%
Certificate/extracurricular options (not credit bearing)	13	22%	8	27%	5	20%	0	0%
None of the above - achievement is not recognised	12	21%	5	17%	5	20%	2	67%

Table 4.4b How achievement is recognised in respect of staff digital capabilities (top five).

Section Summary

The aim of this section was to explore how higher education institutions develop staff and students' digital capabilities.

This research has shown that most institutions identify digital capability training needs through discussion with students and staff, and, in general, there is a continued lack of formal entry assessments for both staff and students. However, *Anytime self-assessment (i.e. Jisc Digital Discovery Tool)* has grown as a method of assessing students' digital capabilities.

Institutions are continuing to support the just-in-time relevance of learning a new skill at the appropriate time e.g. before preparing a digital assessment. Small institutions rely heavily on academic study skills teams to support the embedding of digital capabilities in the curriculum, while medium institutions rely more on the library, and academic departments and schools support large institutions.

The findings of this section have several important implications for future practice and further exploration and sharing of good practice should be encouraged especially around embedding digital capability support into the curriculum.

Section 5: Accessibility and Inclusion

This section covers the issues and available support around accessibility and inclusion that the reliance on technology may highlight and explores some of these issues and how institutions are tackling them.

Question 5.1: Which of the following measures do you provide to support students and staff in terms of digital inclusion or digital poverty?

This question was introduced to capture post-COVID-19 practices that rely heavily on technology, acknowledging that access to hardware e.g. laptops, tablets and software can vary between staff and especially students.

Table 5.1a shows the measures taken to provide support to students with the data also presented by type of institution. The highest-ranking measure was *Laptop loan* (90%), followed by *Dedicated spaces on campus* (86%), perhaps emphasising that institutions are encouraging students to continue to study on-campus, while the third most popular measure was a *Software hub with a range of relevant software for home use* (83%).

Tablets and smart phones were the lowest ranked (16%) and just one respondent (2%) indicated that they do not provide any measures to support students in terms of digital inclusion or digital poverty.

Tables A5.1ab-ac in the Appendix provide the breakdowns by country and size of institution.

Measures to support: students (Base: All respondents)	Total		Type					
			Pre-92		Post-92		Other	
	No.	%	No.	%	No.	%	No.	%
	(58)		*(30)*		*(25)*		*(3)*	
Laptop Loan	52	90%	27	90%	23	92%	2	67%
Dedicated spaces on campus	50	86%	27	90%	22	88%	1	33%
Software hub with access to a range of relevant software for home use	48	83%	24	80%	23	92%	1	33%
Dedicated hardship fund for digital poverty related support	44	76%	25	83%	18	72%	1	33%
Specific course related hardware loan (camera, mics, etc)	38	66%	19	63%	19	76%	0	0%
Remote or on-campus access to high spec PC	38	66%	22	73%	16	64%	0	0%
Headset with microphone	21	36%	12	40%	9	36%	0	0%
Institutional Purchase Scheme with discount	19	33%	9	30%	10	40%	0	0%
WiFi Dongles	15	26%	8	27%	7	28%	0	0%
Tablet/Smart phone loan	9	16%	6	20%	3	12%	0	0%
None of above are provided	1	2%	1	3%	0	0%	0	0%

Table 5.1a Measures provided to support students in terms of digital inclusion or digital poverty.

Table 5.1b shows the measures taken to provide support to staff, with the data also presented by different types of institution and illustrates that the highest-ranking measure was *a Software hub with access to a range of relevant software for home use* (83%). *Laptop loan* was ranked 6th (59%) in contrast to its top ranking when considering the measures undertaken to support students. *Dedicated hardship fund* and *No measures* came in at the bottom of the ranking (each 3%).

Measures to support: staff (Base: All respondents)	Total		Type					
			Pre-92		Post-92		Other	
	No.	%	No.	%	No.	%	No.	%
	(58)		(30)		(25)		(3)	
Software hub with access to a range of relevant software for home use	48	83%	25	83%	23	92%	0	0%
Headset with microphone	46	79%	22	73%	23	92%	1	33%
Dedicated spaces on campus	43	74%	21	70%	21	84%	1	33%
Remote or on-campus access to high spec PC	40	69%	21	70%	19	76%	0	0%
Specific course related hardware loan (camera, mics, etc)	35	60%	20	67%	15	60%	0	0%
Laptop Loan	34	59%	15	50%	18	72%	1	33%
Institutional Purchase Scheme with discount	16	28%	10	33%	6	24%	0	0%
Tablet/Smart phone loan	14	24%	6	20%	8	32%	0	0%
WiFi Dongles	14	24%	9	30%	4	16%	1	33%
Dedicated hardship fund for digital poverty related support	2	3%	2	7%	0	0%	0	0%
None of above are provided	2	3%	2	7%	0	0%	0	0%

Table 5.1b Measures provided to support staff in terms of digital inclusion or digital poverty.

Question 5.2: Does your institution have guidelines for the following in respect of supporting staff in developing accessible materials?

Table 5.2a shows whether institutions have guidelines for learning and teaching in respect of supporting staff in developing accessible materials, while Table 5.2b displays whether institutions provide general guidelines.

Guidelines for Learning and Teaching (Row percentages shown, based on numbers in brackets)	Yes		No, but working towards this		No	
	No.	%	No.	%	No.	%
On creation of accessible and inclusive documents and resources e.g. guidance on accessible MS Word and PDFs (58)	55	95%	1	2%	2	3%
On creation of images and diagrams e.g. meaningful alternative text (57)	53	93%	2	4%	2	4%
On provision of alternative formats (58)	53	91%	2	3%	3	5%
On accessibility checking (58)	50	86%	5	9%	3	5%
On captioning for lecture capture (58)	49	84%	3	5%	6	10%
On captioning of pre-recorded media re e.g. advice of captioning, audio transcript (58)	48	83%	4	7%	6	10%
On sharing of student-created digital materials (58)	16	28%	13	22%	29	50%

Table 5.2a Learning and teaching guidelines in respect of supporting staff in developing accessible materials.

When we consider guidelines for learning and teaching (Table 5.2a), between 83% and 95% of institutions responded positively to all of the options, except for *On sharing of student-created digital materials* with 28% of institutions

reporting they have these guidelines, 50% noting they had no guidelines and 22% indicating they were working towards having guidelines.

Considering general guidelines (Table 5.2b), between 76% and 88% of institutions responded positively to all of the options, except for *On creation/purchase of accessible and inclusive software*, with 57% reporting positively, 22% noting they had no guidelines and 21% indicating they were working towards having guidelines.

Tables A5.2aa-A5.2lc in the Appendix presents the data by institution type, country and size of institution.

General guidelines *(Row percentages shown, based on 58 respondents)*	Yes		No, but working towards this		No	
	No.	%	No.	%	No	%
On creation of accessible and inclusive documents and resources e.g. guidance on accessible MS Word and PDFs	51	88%	4	7%	3	5%
On creation of images and diagrams e.g. meaningful alternative text	50	86%	3	5%	5	9%
On captioning of pre-recorded media	48	83%	5	9%	5	9%
On availability of accessible and inclusive software	44	76%	6	10%	8	14%
On creation/purchase of accessible and inclusive software	33	57%	12	21%	13	22%

Table 5.2b General guidelines to support staff in developing accessible materials.

Question 5.3: Which of the following takes place to help develop student and staff digital capabilities in relation to accessibility and inclusion?

This question considered how we support staff and students to develop their digital capabilities with respect to accessibility and inclusion. Since the Public Sector Bodies (Websites and Mobile Applications) Accessibility Regulations 2018 became a statutory requirement, the development of digital capabilities has become more prevalent across the UK HE sector. Surprisingly, only a small number of institutions (7% students, 16% staff) make training mandatory considering the legislation implications, with no steps being taken for students by 22% of institutions and for staff by 2% of responding institutions (Tables A5.3aa-bc in the Appendix). The focus is largely on support for staff to ensure that public online content is accessible, in line with legislation, with students less likely to create online content. However, raising awareness of the legislation among students will benefit them in the workplace and provide employability skills.

Ways of developing digital capabilities *(Base: All respondents)*	Students *(58)*	Staff *(58)*
Online resources	59%	78%
Helpdesk	55%	69%
Optional online training	47%	88%
Drop-in clinics or appointments	47%	66%
Internal comms	43%	60%
Optional sign-up training	36%	74%
Webinars	28%	67%

Table 5.3 Methods used to help develop student and staff digital capabilities in relation to accessibility and inclusion.

Table 5.3 displays the top seven ways of developing digital capabilities in relation to accessibility and inclusion for students and compares them to the proportion of respondents indicating that these methods are used for staff. Overall, Table 5.3 highlights that there is generally a stronger focus on helping develop staff digital capabilities in relation to accessibility and inclusion than for students. *Optional online training* for staff takes place at 88% of responding institutions, compared to less than half indicating that this is offered to students, while just 28% of responding institutions indicated that *Webinars* are offered to students, compared to two-thirds providing them for staff.

Question 5.4: Does the institution consider accessibility and inclusion in the areas listed below?

In the Digital Capabilities 2019 Survey, this question was only asked in the context of *Procurement of digital systems and software*, with 58% of responding institutions considering accessibility and inclusion, and a further 35% working towards doing so. Table 5.4 highlights that, in 2024, 90% of responding institutions consider accessibility and inclusion during the *Procurement of digital systems and software*, the highest of the areas listed, with a further 9% indicating they were working towards this goal.

More than 70% of responding institutions consider accessibility and inclusion in the *Design and development of new programmes and modules*, the *Production of external facing documents* and the *Production of in-house templates/documents*, with more than 15% indicating they were working towards this in each of these areas.

Accessibility and inclusion (Row percentages shown, based on 58 respondents)	Yes		No, but working towards this		No	
	No.	%	No.	%	No	%
Procurement of digital systems and software	52	90%	5	9%	1	2%
Design and development of new programmes and modules	48	83%	10	17%	0	0%
Production of external facing documents	46	79%	9	16%	3	5%
Production of in-house templates/documents	42	72%	11	19%	5	9%
Staff recruitment, e.g. incorporation into job descriptions	37	64%	9	16%	12	21%

Table 5.4 Whether the institution considers accessibility and inclusion in different areas.

Question 5.5: Does your institution <u>formally assess</u> or <u>benchmark</u> its progression on <u>accessibility and inclusion</u> over time or across departments?

Table 5.5 shows the number of institutions that formally assess or benchmark their progression on accessibility and inclusion over time or across departments, with the data also provided by institution type.

Assessing/benchmarking of progress (Base: All respondents)	Total		Type					
			Pre-92		Post-92		Other	
	No.	%	No.	%	No.	%	No.	%
	(58)		*(30)*		*(25)*		*(3)*	
Yes	27	47%	14	47%	12	48%	1	33%
Have tried, but do not do so regularly	17	29%	8	27%	9	36%	0	0%
No	14	24%	8	27%	4	16%	2	67%

Table 5.5 Whether formally assess or benchmarks progress on accessibility and inclusion.

Overall, almost half of responding institutions indicated they assessed or benchmarked across departments in 2024, compared to one-quarter of responding institutions in the 2019 Digital Capabilities Survey. Additionally, 24% of responding institutions reported that they did not formally assess or benchmark progress in 2024, compared to 59% in 2019.

Additionally, 21 respondents provided details on how they formally assess or benchmark progress, with twelve reporting that they used accessibility tools (e.g. Anthology Ally) to report on the accessibility of content in their LMS, while seven indicated they conduct exercises such as benchmarking, auditing and reviews to understand their position.

Question 5.6: Has your institution claimed disproportionate burden in relation to any aspect of accessibility (as outlined in PSBAR 2018 Regulations)?

This question was introduced to indicate whether institutions had claimed that the legislation placed a disproportionate burden on their organisation. Overall, 81% of responding institutions declared that they had not faced a disproportionate burden, while 19% indicated they had, providing them with an opportunity to undertake an assessment detailing a reasonable argument explaining why they were unable to meet the requirements.

Table 5.6 illustrates that a slightly higher proportion of medium-sized institutions (22%) declared a disproportionate burden; however, this could be misleading with the numbers not that different across the institution sizes.

Disproportionate burden (Base: All respondents)	Total		Size of Institution					
			Small		Medium		Large	
	No.	%	No.	%	No.	%	No.	%
	(58)		(12)		(23)		(23)	
No	47	81%	10	83%	18	78%	19	83%
Yes	11	19%	2	17%	5	22%	4	17%

Table 5.6a Whether institution have claimed disproportionate burden in relation to accessibility.

Section Summary

In summary, institutions have put in place several practical measures to support students' access to digital hardware.

In terms of guidelines, institutions have put in place, or are working towards guidelines on accessibility and inclusion, especially for staff involved with learning and teaching.

Notably, in terms of software procurement and the design of new programmes or modules, more institutions have guidelines in place or are actively working towards them. However, the proportion of responding institutions that formally benchmark their progress on accessibility and inclusion remains below 50% of respondents.

Section 6: Support for Digital Education Development

This section of the Survey looked at the provision of staff supporting digital education at responding institutions. It considered support for both centrally-supported tools and services (such as those in question 2.1) and tools and services that are not centrally supported.

Question 6.1: For each of the following activities, how many staff do you have providing support for this area and which team/department takes the lead?

The first part of this question aimed to identify how many staff, based on full time equivalent (FTE) numbers, were involved with supporting specific activities related to digital education. The means are shown in Table 6.1a and other statistics are provided in the Appendix. Respondents typically entered a numeric value but sometimes noted that it was not possible to determine an exact figure. In some cases, especially for small teams, where there are no dedicated roles for specific areas, respondents appear to have listed all the staff within their team, which has meant figures may be higher than the reality.

> "*It is very difficult, if not impossible, to determine the total FTE for each of these areas, as these are typically embedded into job responsibilities of staff from across multiple departments and areas of activity*."

Table 6.1a shows that the highest staff FTE means are for *TEL end user support* (8.60) and *Pedagogic advice and guidance on using TEL* (7.55). Areas with the lowest average staff FTE include *Learning analytics* (1.76) and *Assistive technologies* (3.29). Notably, *Digital capabilities support for staff* (6.00) is better resourced than *Digital capabilities support for students* (4.03); however, it is possible that respondents have attributed TEL training as supporting staff digital capabilities, which could account for the difference.

Considering the size of institution (Table 6.1a), the mean FTE of staff generally increases with the size of institution, which is perhaps not surprising, with large institutions recording a mean of 12.94 FTE for *TEL end user support*, compared to 3.74 FTE in small institutions. However, there are some differences, with small institutions recording a higher mean FTE (5.44) for support for *Physical learning spaces* than medium (4.87) and large institutions (3.46); however, this is possibly skewed by large numbers from two institutions. Additionally, medium-sized institutions have a higher mean FTE for *Digital capabilities support for students* (5.19) compared to small (3.84) and large-sized institutions (2.84).

FTE staff supporting digital education (means) *(Base: All respondents)*	Total	Small	Medium	Large
	(51)	*(11)*	*(22)*	*(18)*
TEL end user support (e.g. training and guidance)	8.60	3.74	7.49	12.94
Pedagogic advice and guidance on using TEL	7.55	4.28	6.08	11.27
Learning design and programme development	6.67	3.50	5.48	9.94
Digital capabilities support for staff	6.00	4.84	6.32	6.42
TEL technical support (e.g. system administrator, developer)	5.28	2.68	4.51	7.91
Generative Artificial Intelligence	4.56	2.25	4.21	7.14
Physical learning spaces (e.g. design and support of active learning spaces, hybrid learning spaces)	4.49	5.44	4.87	3.46
Digital Accessibility	4.39	4.00	3.60	5.51
Digital capabilities support for students	4.03	3.84	5.19	2.84
Assistive technologies	3.29	2.80	2.60	4.39

Learning analytics	1.76	1.44	1.04	2.65

Table 6.1a Mean staff FTE associated with supporting digital education.

The second part of this question asked which team or department was responsible for taking the lead on support for specific areas. This was an open response question, with respondents entering the relevant team or department, and the responses categorised using the departments identified in question 4.2 as a guide. Where more than one department is responsible, this has been noted as 'Joint' and where no department is responsible, this is recorded as 'None'. In some cases, respondents did not provide a response for every support area listed so this has been noted as 'No response'. Note that the percentages presented in Table 6.1b are based on the 55 respondents indicating a department or team takes the lead for any of the activities.

For the areas related to TEL end-user and pedagogic support Digital Education teams often take the lead, which is to be expected, with some academic development teams also being responsible (Table 6.1b).

TEL technical support is more likely to be led by either Digital Education (35%) or IT (36%) teams, and where this was noted as Joint support (15%), it is usually shared between Digital Education and IT. In small institutions, TEL technical support is predominantly the responsibility of Digital Education (58%), whilst in medium and large institutions there is more of an even split (Table A6.1f in the Appendix).

Digital Education teams are more often responsible for Digital accessibility (Table 6.1c); however, there are other areas taking the lead including IT, the Library, Academic Development and Disability support. Overall, 20% of respondents noted that the responsibility was Joint, and this was generally between Digital Education and another department, such as IT, Disability support or the Library.

Support for Assistive technologies is more often led by Disability support (Table 6.1c), with just 9% of Digital Education teams leading this area, while 22% of respondents noted that the responsibility was Joint, and this was generally between the Library and either IT or Disability support.

Lead departments *(Base: All respondents)*	TEL technical support	TEL end user support	Pedagogic advice and guidance on using TEL	Learning design and programme development	Digital capabilities support for staff	Digital capabilities support for students
Digital Education	35%	67%	58%	33%	31%	16%
Academic Development	7%	16%	24%	38%	7%	4%
IT	36%	5%	2%	0%	11%	11%
Library	4%	4%	2%	0%	4%	11%
Academic/Study skills	0%	0%	0%	0%	0%	9%
HR/Organisational development	0%	0%	0%	2%	2%	0%
Disability support	0%	0%	0%	0%	0%	2%
Joint	15%	7%	13%	9%	29%	18%
Other	0%	0%	0%	5%	4%	4%
None	0%	0%	0%	4%	2%	13%
No response	4%	0%	2%	9%	11%	13%

Table 6.1b Departments taking the lead for the support of Digital Education Development.

Digital capabilities support for staff is led by Digital Education teams at almost one third of responding institutions, with 29% noting that this support is jointly shared between Digital Education and IT. In terms of digital capabilities

support for students, there is no clear pattern with the lead role being taken by Digital Education (16%), IT (11%) and the Library (11%). Additionally, where this was a Joint responsibility, it tended to be shared between Digital Education and either IT or the Library. Some institutions reported Academic/Study Skills teams taking the lead or sharing responsibility with another department. Worryingly, 13% of responding institutions noted that no department took responsibility for digital capabilities support for students, and it is not clear whether there is no support available, or if addressing this falls under the responsibility of academics.

Support for Learning design and programme development (Table A6.1h in the Appendix) is more often led by Academic Development (38%) or Digital Education (33%), while at 9% of responding institutions the support was jointly shared between Academic Development and Digital Education. Small institutions are more likely to see this led by Digital Education teams (58%), whilst in medium and large-sized institutions this is more likely to be led by Academic Development (both 41%).

Physical learning spaces is the only category where there are no Digital Education teams taking the lead (Table 6.1c), while in 36% of cases this is Joint, and several institutions noted that this is a cross-institutional activity with several teams involved in different aspects, predominantly Estates, IT and Digital Education.

For Learning analytics, No response (25%) was the highest percentage, which is to be expected as the use of Learning analytics is not widespread across the sector, with question 3.9 reporting that only 29% of institutions are using it in 50% or more of their courses. In terms of ownership, this is led by either Digital Education (20%), IT (15%) or Other departments (15%).

Generative AI also had a high level of No response (29%), which is surprising given the focus on Generative AI noted in Section 7. Leadership of this area was more often Joint (22%), otherwise it was led by Academic Development (20%) or Digital Education (16%). In institutions where it was Joint, it tended to be a cross-institutional working group or involved Digital Education working with IT.

Lead departments *(Base: All respondents)*	Digital Accessibility	Assistive technologies	Physical learning spaces	Learning analytics	Generative Artificial Intelligence
Digital Education	36%	9%	0%	20%	16%
IT	11%	4%	24%	15%	2%
Academic Development	7%	2%	2%	2%	20%
Disability support	5%	25%	0%	0%	0%
Student support	0%	15%	0%	7%	0%
Library	7%	5%	2%	0%	0%
Estates	0%	0%	5%	0%	0%
Joint	20%	22%	36%	13%	22%
Other	2%	0%	11%	15%	5%
None	2%	4%	2%	4%	5%
No response	9%	15%	18%	25%	29%

Table 6.1c Departments taking the lead for the support for Digital Education Development.

Question 6.2: What changes in staff provision for supporting digital education, if any, have been made over the <u>last two years</u>?

Question 6.2 asked about changes to staffing provision over the past two years, including reductions and increases of fixed term/temporary staff, restructures, changes to existing roles, recruitment freezes and delays. The changes most frequently implemented were *Increase in the number of staff, Restructure of departments* and *Recruitment delays and freezes,* and this was generally consistent across institution type (Table 6.2), country and size (Tables A6.2b-c in the Appendix).

Where increases were noted, these were driven by increases in IT staff, an increase in dedicated FTEs and specific projects/initiatives. Those who reported restructures varied between complete reorganisation across their institution to the merging of departments/services; e.g. AV, Digital Education, IT and the Library and/or creation of new units. Where there have been reductions in FTEs, these have, in some cases, been compensated with fixed term contracts to cover projects. While 43% of institutions found there was an increase in the number of staff over the two-year period, the flip side of this was 38% reporting recruitment freezes and delays, with some of this manifesting in posts being left vacant when staff leave, either permanently or temporarily, as a cost saving measure.

Changes in staffing provision by institution type.	Total		Type					
			Pre-92		Post-92		Other	
Base (All respondents)	No.	%	No.	%	No.	%	No.	%
	(58)		(30)		(25)		(3)	
Increase in the number of staff	25	43%	16	53%	9	36%	0	0%
Restructure of departments	25	43%	12	40%	12	48%	1	33%
Recruitment delay/freeze	22	38%	11	37%	11	44%	0	0%
Reduction in the number of staff	19	33%	10	33%	9	36%	0	0%
Change of existing roles/incorporation of other duties	15	26%	8	27%	7	28%	0	0%
Increase in the number of fixed-term staff	14	24%	10	33%	4	16%	0	0%
No changes	13	22%	6	20%	5	20%	2	67%
Increase in the number of temporary staff for emergency cover	8	14%	5	17%	3	12%	0	0%

Table 6.2 Staffing changes made over the last two years.

Question 6.3 Why have these changes been made?

As a follow-up to question 6.2, question 6.3 asked respondents to consider the reasons behind these changes. Where staffing increases were recorded by individual organisations, these were attributed to the need to support student digital capability, the education strategy and digital assessment, digital transformation, and availability of short-term funding and temporary projects (including online learning initiatives). Where there have been reductions and/or restructures, these have been associated with declining student numbers (across the sector) and market conditions, the outsourcing of services, financial pressures and a realignment of teams.

Question 6.4 Do you foresee changes in the staffing provision for supporting digital education in the near future?

Changes in staffing provision in the near future	Total		Type					
			Pre-92		Post-92		Other	
Base (All respondents)	No.	%	No.	%	No.	%	No.	%
	(58)		(30)		(25)		(3)	
Anticipate change, but unsure as to how it might change	25	43%	13	43%	11	44%	1	33%
Change of existing roles/incorporation of other duties	24	41%	14	47%	10	40%	0	0%
Recruitment delay/freeze	22	38%	11	37%	11	44%	0	0%
Currently reviewing staffing provisions	17	29%	8	27%	8	32%	1	33%
Restructure of departments / TEL provisions	14	24%	11	37%	3	12%	0	0%
Increase in the number of fixed-term staff	12	21%	8	27%	4	16%	0	0%
Increase in the number of staff	11	19%	7	23%	2	8%	2	67%
Reduction in the number of staff	10	17%	6	20%	4	16%	0	0%

Table 6.4 Staffing changes foreseen in the near future.

Table 6.4 presents the staffing changes foreseen in the near future at ten or more responding institutions. The most anticipated changes are a *Change of existing roles/incorporation of other duties* (41%) and a *Recruitment delay/freeze* (38%). In terms of institutional types, compared to the sector, Pre-92 institutions are more likely to anticipate a *Restructure of departments* (37%) and an *Increase in the number of fixed-term staff* (27%). Notably, 43% of respondents indicated that they were anticipating a change, but they did not know what this would involve.

'Other' responses noted a reference to a previous or forthcoming period of change, such as restructures, uncertainty about funding, conducting a bench-marking exercise and possible staff increases to support wholly online programmes.

Section Summary

This section considered the staff FTE for a range of support areas. Unsurprisingly, institutions focus their staffing on core Digital Education areas such as TEL end-user support and pedagogic advice, with Learning analytics the area with the least staff FTE, on average (1.76).

Digital Education teams are actively leading a number of areas related to digital education provision and this is often in partnership with other departments such as Academic Development and IT. Digital Education teams are least likely to lead in the areas of Assistive Technology and Physical Learning Spaces, but some teams do work in partnership with departments such as Disability Support and Estates.

In terms of staffing provision, there have been mixed experiences across the sector with some institutions reporting increases in staffing, whilst others have seen a reduction or have been faced with recruitment delays/freezes that have impacted capacity. This situation looks set to continue with similar trends noted for the future.

Section 7: Looking to the future

This section of the Survey invited respondents to report on new and emerging trends in digital education, taking into consideration technology enhanced learning provision and the development of staff and students' digital capabilities. Retaining the approach used in previous surveys, respondents were asked questions concerning potential barriers to the development of digital education, as well as the initiatives they were planning to lead over the next two years and any potential developments making demands on institutional support services.

Question 7.1: Listed below are potential <u>barriers</u> to any (further) development of processes to promote and support digital education. What, in your opinion, might be the barriers in your institution over the coming years?

Table 7.1 shows the most frequently observed barriers to any (further) development of processes to promote and support digital education over the coming years, with the data presented by institution type.

Potential barriers to processes to promote and support digital education	Total		Type					
			Pre-92		Post-92		Other	
	Mean	Rank	Mean	Rank	Mean	Rank	Mean	Rank
(Base: All respondents)	*(58)*		*(30)*		*(25)*		*(3)*	
Lack of time	3.74	1	3.70	1	3.76	1	4.00	1
Lack of internal sources of funding to support development	3.22	2	3.17	=2	3.28	2	3.33	=3
Competing strategic initiatives	3.19	3	3.17	=2	3.16	3	3.67	2
Departmental/school culture	2.98	4	3.10	4	2.92	=5	2.33	=15
Lack of academic staff knowledge	2.90	5	2.87	6	2.92	=5	3.00	=7
Lack of awareness of available support	2.86	6	2.73	9	3.04	4	2.67	=12
Lack of academic staff commitment	2.72	7	2.77	=7	2.60	10	3.33	=3
Lack of external sources of funding	2.69	8	2.63	=10	2.68	9	3.33	=3
Institutional culture	2.66	=9	2.90	5	2.44	=13	2.00	=17
Changing administrative processes	2.66	=9	2.47	=12	2.84	7	3.00	=7
Lack of incentives	2.66	=9	2.77	=7	2.52	11	2.67	=12

Table 7.1 The top ranked potential barriers to any (further) development of processes to promote and support digital education.

Tables A7.1a-7.1c in the Appendix provide the full data presented by institution type, country and size of institution. Overall, *Lack of time* is the leading barrier (Table 7.1), and this is consistent across all institution types, countries and sizes. This maintains the position it has held in previous TEL Surveys dating back to 2005. *Lack of internal sources of funding* and *Competing strategic priorities* complete the top three barriers facing institutions overall, and they are also the leading barriers for all institution types, the English and Welsh institutions and small and medium-size institutions. However, for large institutions, *Departmental/school* and *Institutional culture* represent the leading barriers alongside *Lack of time*. Comparing responses for this question with previous Surveys, *Lack of academic staff knowledge* has a lower mean score (2.90) than the corresponding score recorded in 2020 (3.11), when it was ranked as the second highest potential barrier to the development of processes to promote and support TEL tools. This possibly illustrates the impact of the pandemic and remote teaching in introducing a wider range of staff to the use of digital tools and online delivery, with the focus on developing staff awareness and digital capability.

Question 7.2: Which key initiatives focusing on developing digital education (e.g. new TEL tools, additional support for digital capability and accessibility) does your institution plan to proactively implement or to investigate in the next two years?

Key initiatives planned *(Base: All respondents)*	% *(48)*
Generative AI tools, training, policy and curriculum development	27%
New digital assessment services (e.g. proctoring, EMA, digital exams)	21%
None	19%
Digital capability developments and support for staff and students	17%
Accessibility improvements (including staff training)	13%

Table 7.2a Key initiatives focusing on developing digital education planned to proactively implement in the next two years.

Table 7.2a displays the top five initiatives that responding institutions are planning to proactively implement in the next two years, and highlights that the most common focus is on Generative AI developments (27% of responding institutions), followed by the implementation of new digital assessment services (21% of responding institutions), and these two concerns also represent the leading areas for investigation in the next two years (Table 7.2b).

Key initiatives to be investigated *(Base: All respondents)*	% *(45)*
Generative AI tools	42%
None	31%
Digital assessment (online marking, grading, feedback, exams)	18%
Learning analytics	13%
Collaborative tools (social learning)	9%
AR/VR tools	9%
Staff and student digital capability	9%

Table 7.2b Key initiatives focusing on developing digital education to proactively investigate in the next two years.

Question 7.3 Have any recent and prospective developments in digital education started to make new demands upon your institution in terms of the support required by users?

The majority of responding institutions (86%) indicated that there were recent or prospective developments in digital education that had started to make new demands on the institution in terms of support required by users. The demands identified are presented in Table 7.4.

Recent or prospective developments making demands. *(Base: All respondents)*	Total		Type					
			Pre-92		Post-92		Other	
	No.	%	No.	%	No.	%	No.	%
	(58)		*(30)*		*(25)*		*(3)*	
Yes	50	86%	27	90%	21	84%	2	67%
No	8	14%	3	10%	4	16%	1	33%

Table 7.3 Recent or prospective developments that have started to make new demands on institutions.

Question 7.4 Please enter details of up to three developments that are starting to make new demands in terms of the support required by users – those you think are <u>most </u>important.

This was an open question asking respondents to provide details of up to three developments that are starting to make new demands in terms of support. Cluster analysis has been used to identify common topics across the responses provided and responses have been grouped where possible.

The majority of responding institutions (87%) indicated that Generative AI was a development that was making new demands. In line with the responses to question 7.2, areas of focus include creating/updating guidance, developing and delivering training, surveying staff and students, and developing guidelines and policies for use in teaching, learning and assessment.

Also reflecting the responses to question 7.2, digital assessment was the second most cited demand, although it was only mentioned by 19% of responding institutions. Other developments of note include new or replacement systems (15%), such as the VLE, student information system and customer relationship management system, and expanding online learning provision (15%) in the form of new programmes at degree-level and professional development.

Recent or prospective developments making demands *(Base: All respondents that see demands)*	Total		Type					
			Pre-92		Post-92		Other	
	No.	%	No.	%	No.	%	No.	%
	(47)		(26)		(20)		(1)	
Generative AI	41	87%	23	88%	18	90%	0	0%
Digital assessment (including digital exams)	9	19%	7	27%	2	10%	0	0%
New/replacement systems (e.g. SIS, CRM, VLE)	7	15%	4	15%	2	10%	1	100%
Expanding online learning provision	7	15%	6	23%	1	5%	0	0%

Table 7.4 Top four prospective developments that have started to make new demands.

Section Summary

Lack of time remains the leading barrier to the development of digital education, but it is encouraging to see that the *Lack of academic staff knowledge* has become less of a barrier, potentially showing the impact of rapid upskilling as part of the move online during the COVID-19 pandemic. Unsurprisingly, Generative AI provision dominates future plans with institutions actively planning to implement or investigate this area over the coming two years, recognising that it is currently the leading activity making demands on institutional support.