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## City St George's, University of London

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# Technology Enhanced Learning in UK higher education – 2022 Pulse Survey

UCISA Report

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# Contents

<a href="#">About the Survey</a>	3
<a href="#">Presentation of the Survey data</a>	4
<a href="#">Executive summary</a>	5
<a href="#">Section 1 – TEL tools currently in use</a>	16
<a href="#">Section 2 – Course delivery</a>	28
<a href="#">Section 3 – TEL staffing</a>	34
<a href="#">Section 4 – Future TEL developments</a>	38
<a href="#">Further information</a>	42

# About the Survey

## Background

Since 2001, UCISA have been running a [national survey looking at trends in technology enhanced learning](#) across the UK Higher Education sector. The 11th UCISA Technology Enhanced Learning (TEL) Survey was due to take place in 2022; however, the Survey team and UCISA felt it was time to review and update the Survey alongside UCISA's Digital Capabilities Survey with a view to launching a new combined survey in 2023/24.

Given the events of the past two years, we still wanted to capture some of the changes in the sector since the [2020 Survey](#). We therefore developed a shorter 'pulse survey' to focus on key areas that might have been impacted by the Covid-19 pandemic and the rapid shift to online learning. The Survey retained and adapted 16 questions from the 2020 Survey to enable longitudinal analysis to be undertaken.

## Circulation and completion of the Survey

The Survey was sent to Heads of E-learning (or equivalent) in June/July 2022 via the Heads of E-learning Forum, with follow up emails sent directly to named contacts.

Survey returns were received from 76 of the 152 HE institutions targeted – a response rate of 50%. This was down on previous response rates (62% in 2020, and 68% in 2018), but nonetheless a valuable response from the community given the time of year.

## The workers

The Survey was conducted by members of the UCISA Digital Education Group:

- Julie Voce (City, University of London)
- Richard Walker (University of York)
- Melanie Barrand (University of Leeds)

- Athina Chatzigavriil (London School of Economics)
- Adam Craik (University of Hull)

The project team worked in collaboration with Nick Smith from The Research Partnership (an independent survey organisation) who oversaw the Survey design, implementation and analysis.

The real contributors were, of course, all those who completed the Survey.

## Citation

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# Presentation of the Survey data



The Report commentary focuses on results from the 2022 Survey and, where appropriate, the results are presented in tabular or graphical 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).

As with previous 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). The descriptor Other has been used to capture those specialist higher education providers such as art institutions and business schools whose courses are validated by universities with full degree-awarding powers.

Although 76 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 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 ( $\geq 0.5$ ) or down ( $< 0.5$ ) to whole numbers, so a column of values will not necessarily add up to 100%.



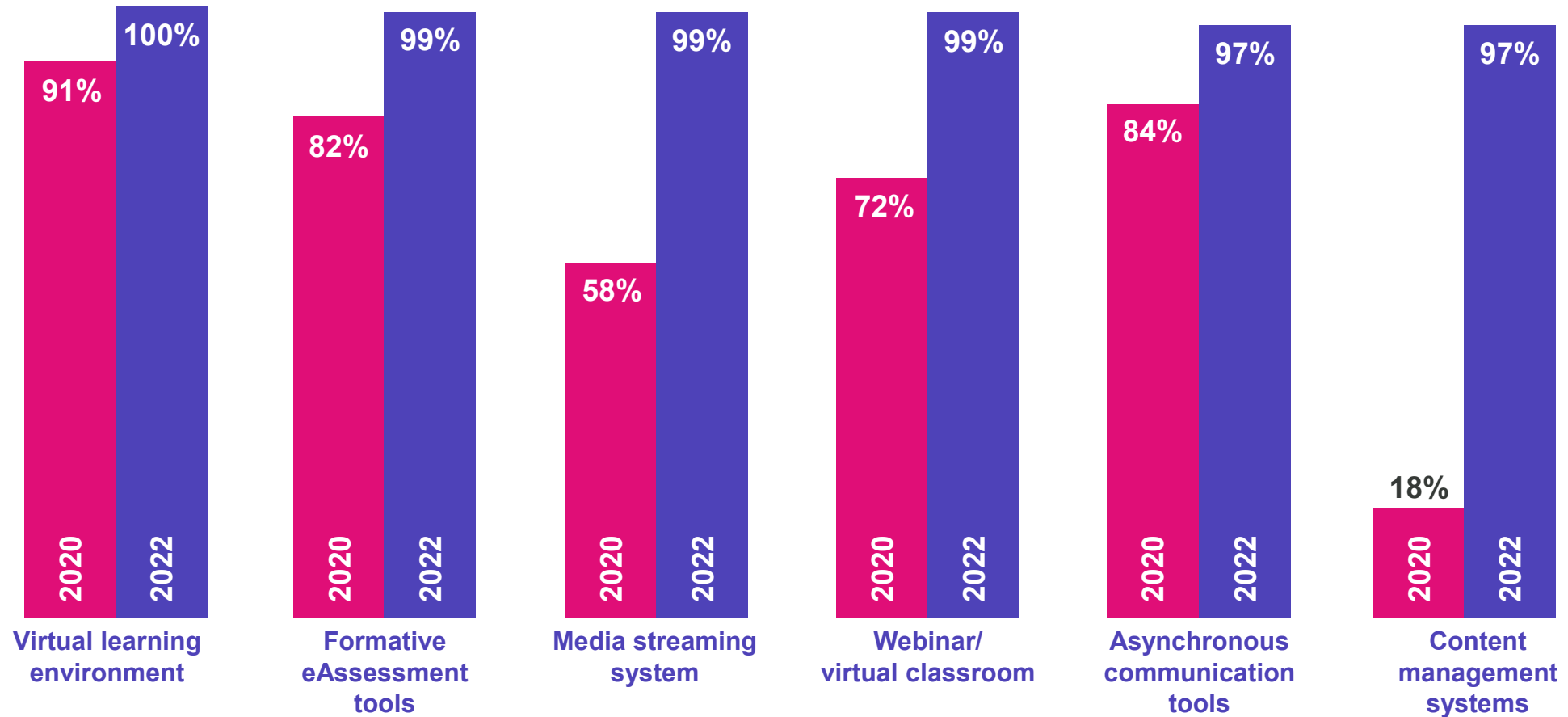
## Executive summary

This section provides an overview of the highlights from the Survey. Compared to 2020, this year's data shows increased provision of centrally-supported TEL tools, an increase in outsourcing of TEL provision and an increase in TEL staffing.

The data also shows that the sector is undergoing a continuous review cycle for TEL services, with a range of tools being reviewed.

In terms of course delivery, there is growth in blended learning; however, fully online learning remains a niche area of activity within schools or departments and hybrid/hyflex delivery is not yet well established across the sector.

# Summary: Centrally-supported TEL tools



Top six tools centrally-supported TEL tools in 2022 compared with 2020 data

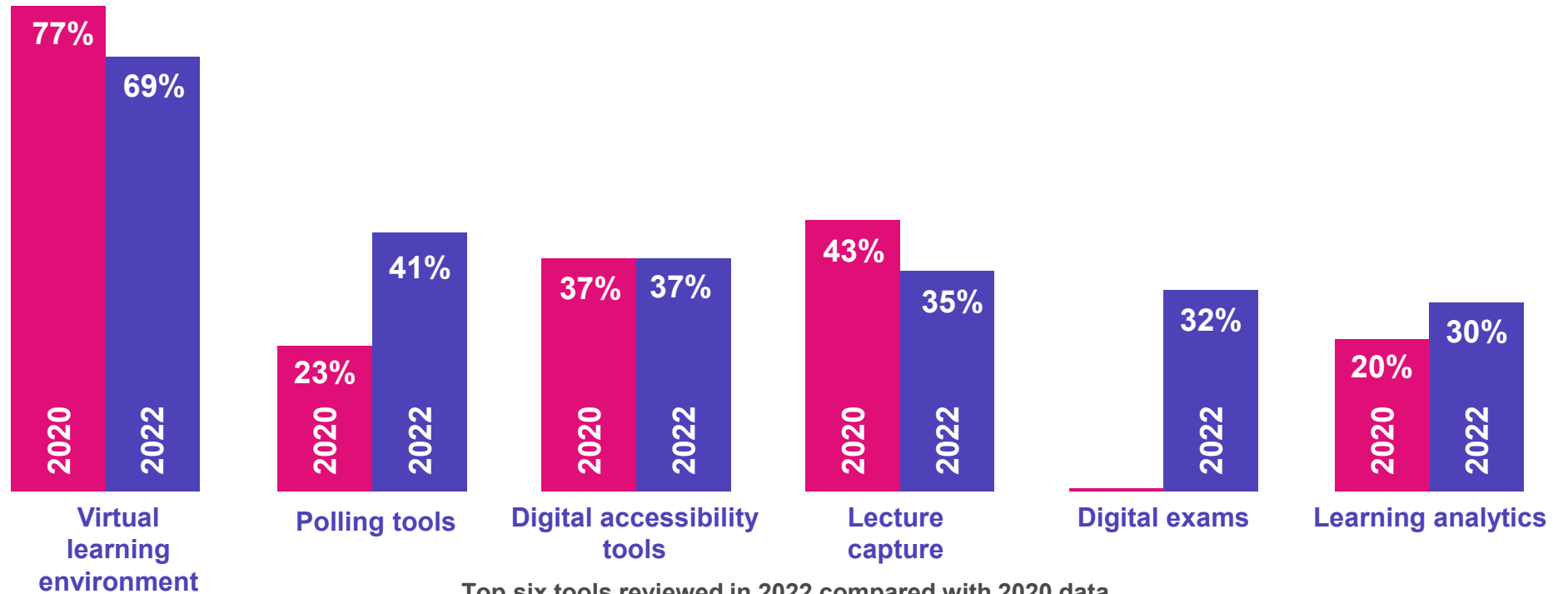
This year's data shows a rise in the number of TEL tools being centrally-supported by institutions compared to 2020. For the top 6 tools, the percentage of institutions reporting centrally-supported use of each tool is over 97%. In 2020, the top six tools were supported by 81%-91% of respondents.

[\[Question 1.1\]](#)

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# Summary: Review of institutional TEL Tools

**71%**  
Institutions have undertaken institutional review in last two years



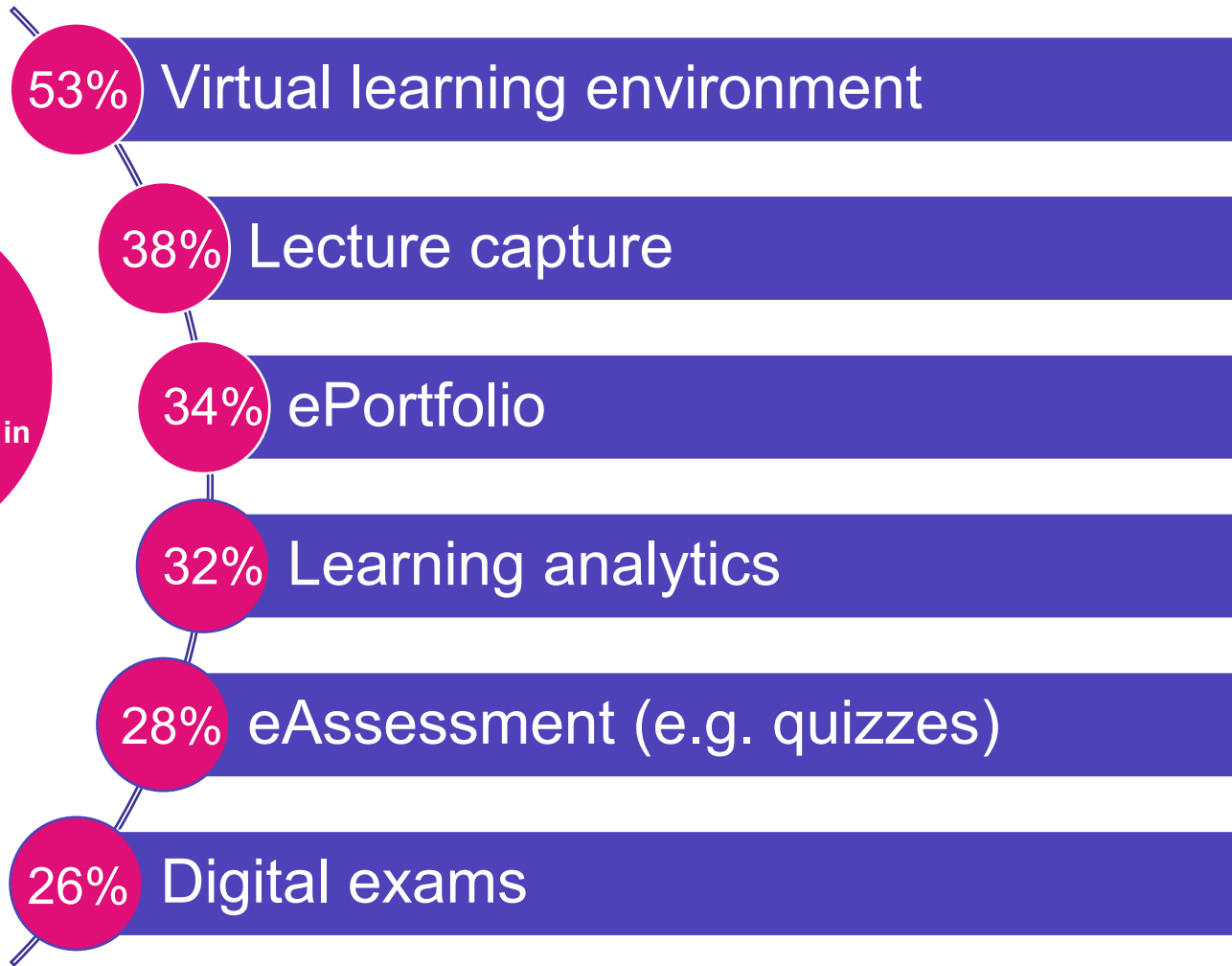
71% of responding institutions reported that a TEL review had been conducted in the last two years. [\[Question 1.2\]](#)

*Virtual learning environment (VLE)* reviews remain the most conducted type of review. Compared to 2020, there has been an increased focus on reviews of *Polling tools* and *Learning analytics* systems. *Digital accessibility tools* and *Lecture capture* remain in the top six, whilst *Digital exams* is a new entry for 2022.

[\[Question 1.3\]](#)

# Summary: Plans to review TEL tools

**70%**  
Institutions are undertaking review in next two years



Top six tools to be reviewed in the next two years

Looking forward, 70% of responding institutions are planning to review their institutional TEL tools in the next two years, showing there is a continuous review cycle across the sector.

[\[Question 1.5\]](#)

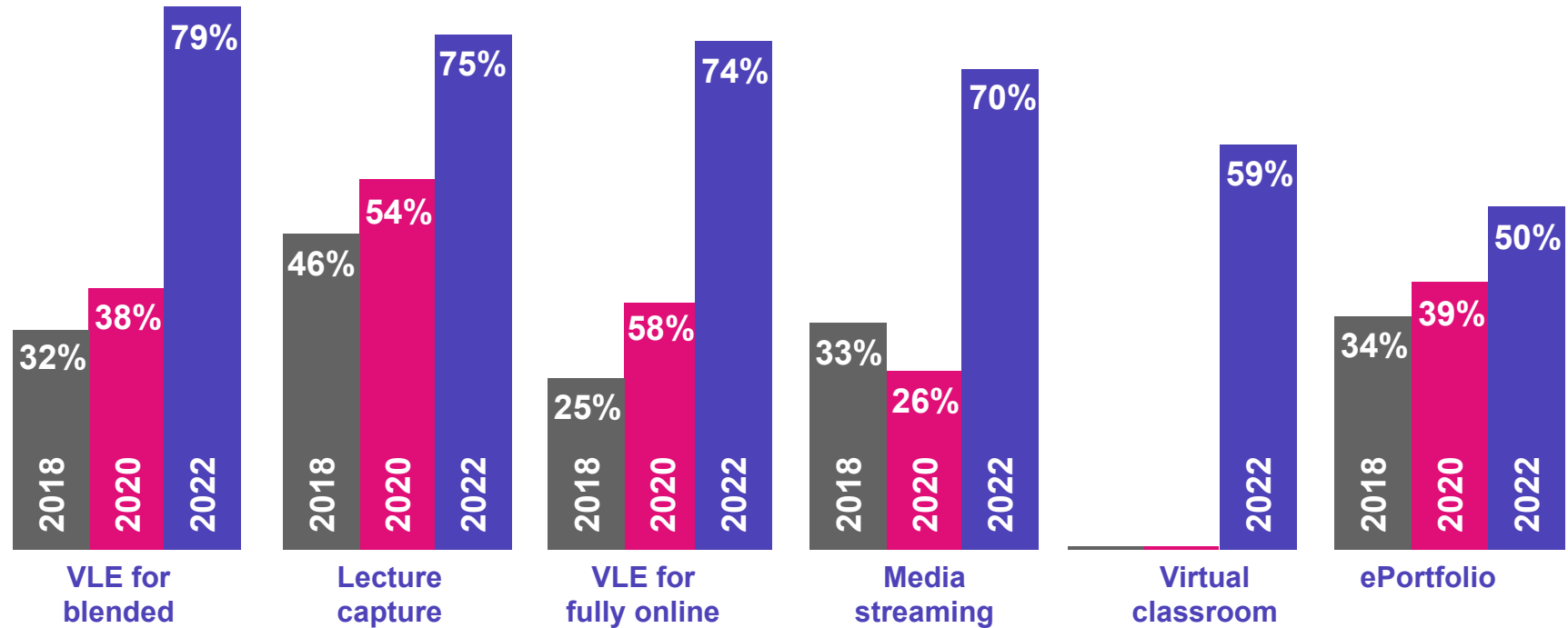
The *Virtual learning environment*, *Lecture capture* and *ePortfolio* remain the most common systems to be the focus of a forthcoming review.

[\[Question 1.6\]](#)

The top three reasons for conducting a review are as part of a regular or wider review, consolidation of multiple platforms and to align with institutional strategy.

# Summary: Outsourcing of TEL services

**93%**  
Institutions  
outsource provision  
of TEL services



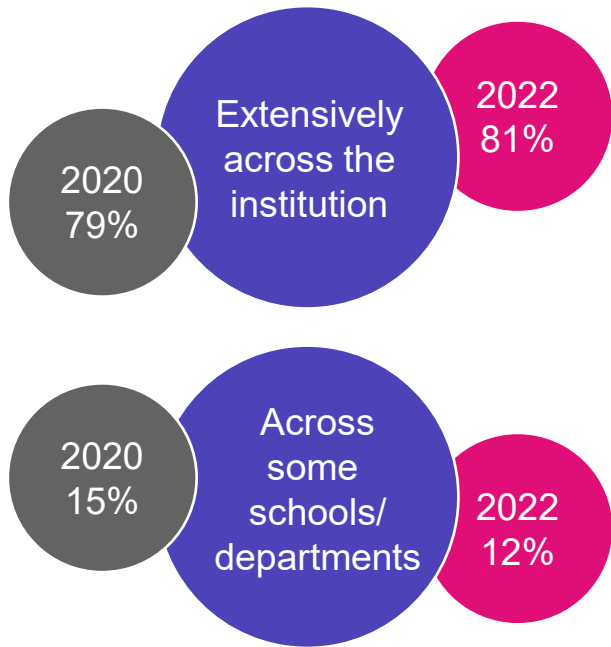
Top six outsourced tools in 2022 compared with 2020 and 2018 data

The outsourcing of provision has grown since the 2020 Survey, with 93% of institutions now outsourcing the provision of TEL services compared to 83% in 2020. We have seen an overall increase in outsourcing across the different TEL services. In terms of the type of hosting, services are typically outsourced as Software as a Service (SaaS), rather than being institutionally managed but hosted by another organisation.

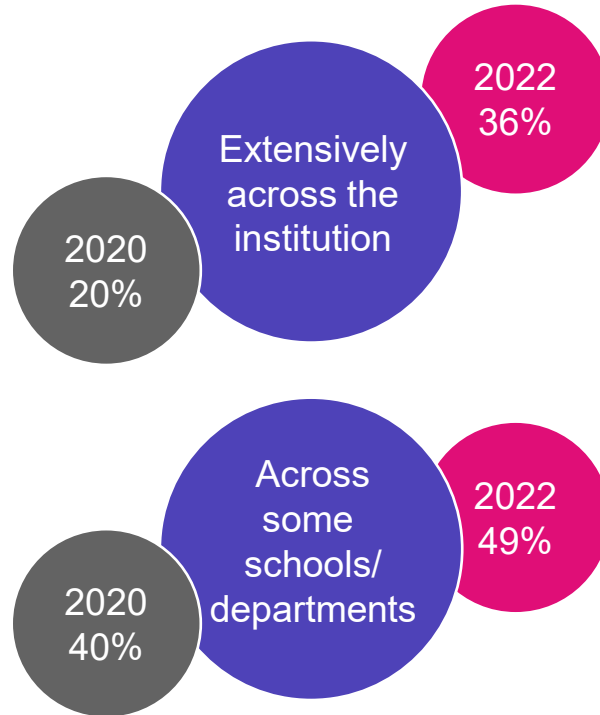
[\[Question 1.8\]](#)

# Summary: Course delivery – blended learning

## Blended learning (lecture notes & supplementary resources)



## Blended learning (active learning)



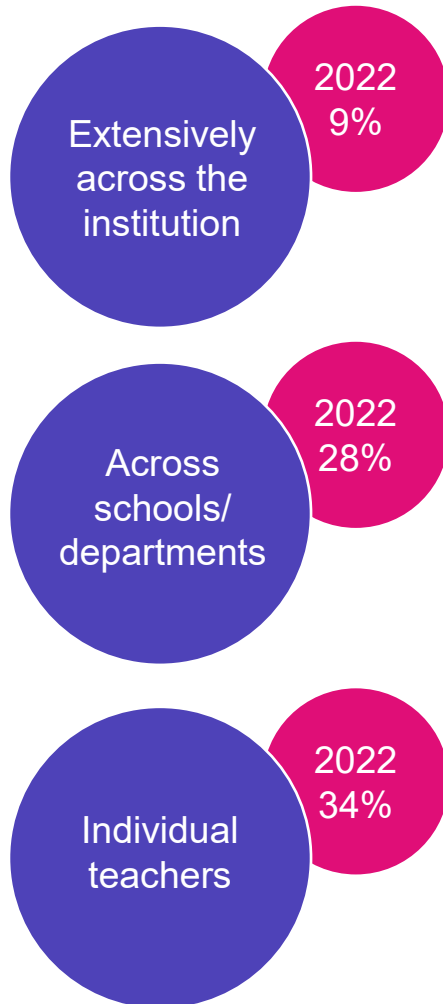
**Blended learning with supplementary resources** remains the most prevalent delivery mode across the sector with 81% of respondents supporting this across the institution.

Since 2020, there has been an increase in the use of **active blended learning** with 36% of institutions reporting that this is supported extensively across the institution, compared with 20% in 2020.

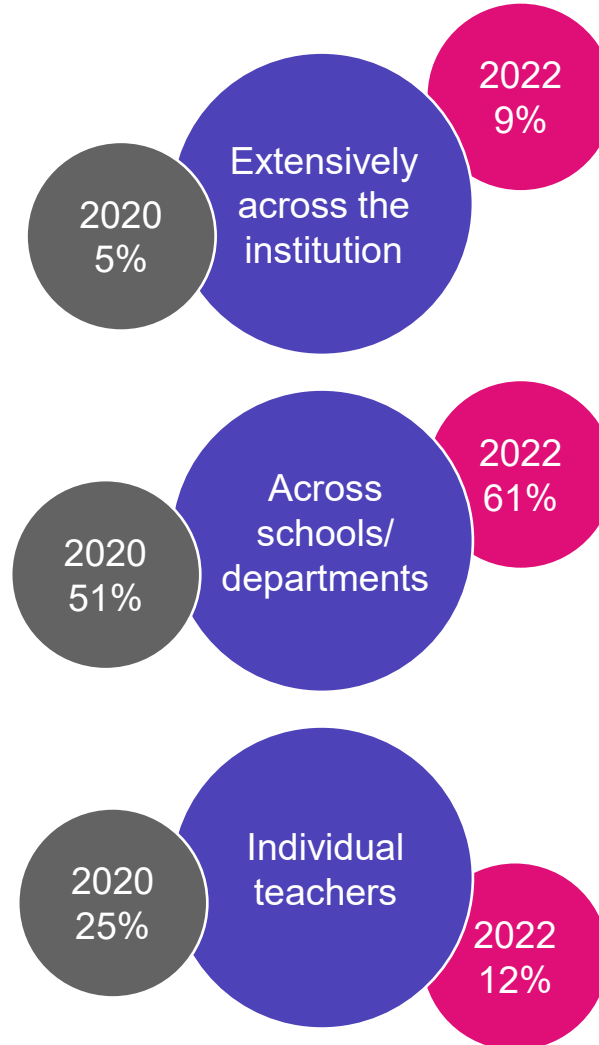
[\[Question 2.1\]](#)

# Summary: Course delivery – hybrid/hyflex and fully online

## Hybrid/HyFlex delivery:



## Fully online delivery:

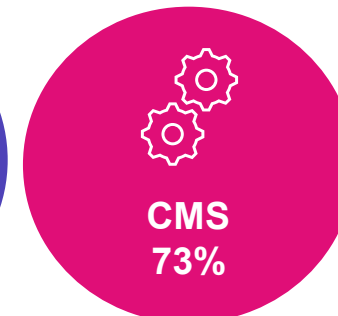
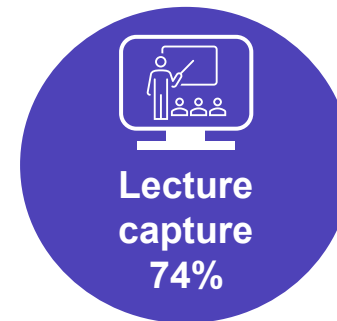
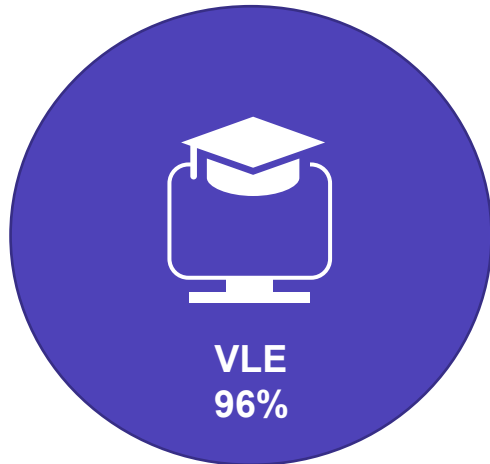


**Hybrid/HyFlex delivery** does not yet seem to be well established across the sector with only 9% of institutions supporting this extensively across the institution. The majority of use is at an individual teacher level (34%).

The number of institutions supporting **fully online delivery** across the institution has doubled since 2020, but still remains low at 9%. There remains a high use (up to 61%) across schools/departments.

[\[Question 2.1\]](#)

## TEL Toolkit 2022



Percentage of institutions where these tools are used in 50% or more of their courses (Top 6 of 10 tools)

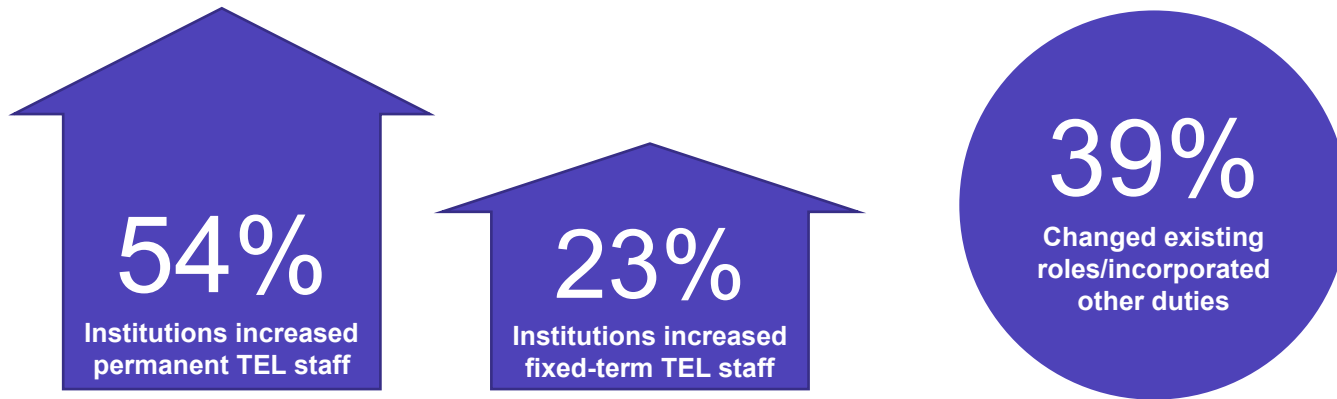
We continue to see a wide range of TEL tools supported across institutions. Our TEL toolkit, of the top six tools in use in 50% or more of an institution's courses, has expanded since 2020 and now includes *Lecture capture*, *Content management systems (CMS)* and *Webinar* platforms. There is very little take up of *Digital exams* and *Proctoring software* across all courses, with less than 10% of responding institutions using it in 50% or more of their courses.

[\[Question 2.2\]](#)

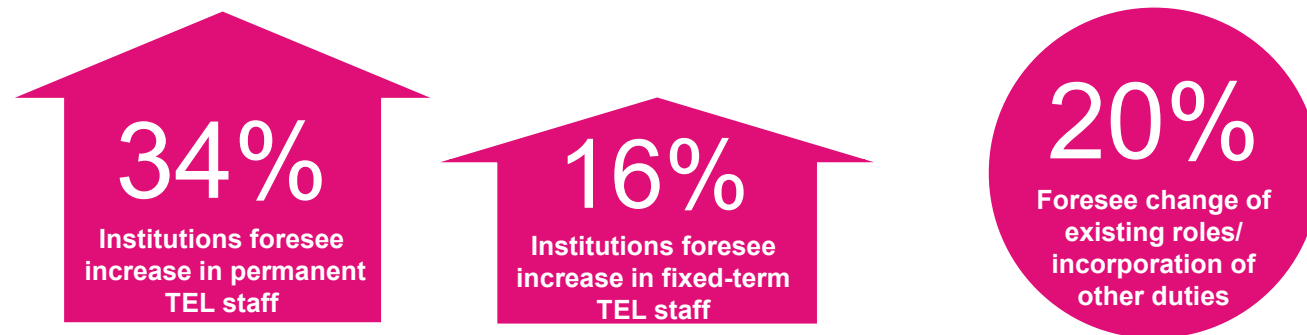
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# Summary: Staffing levels continue to change

## In last two years:



## In the near future:



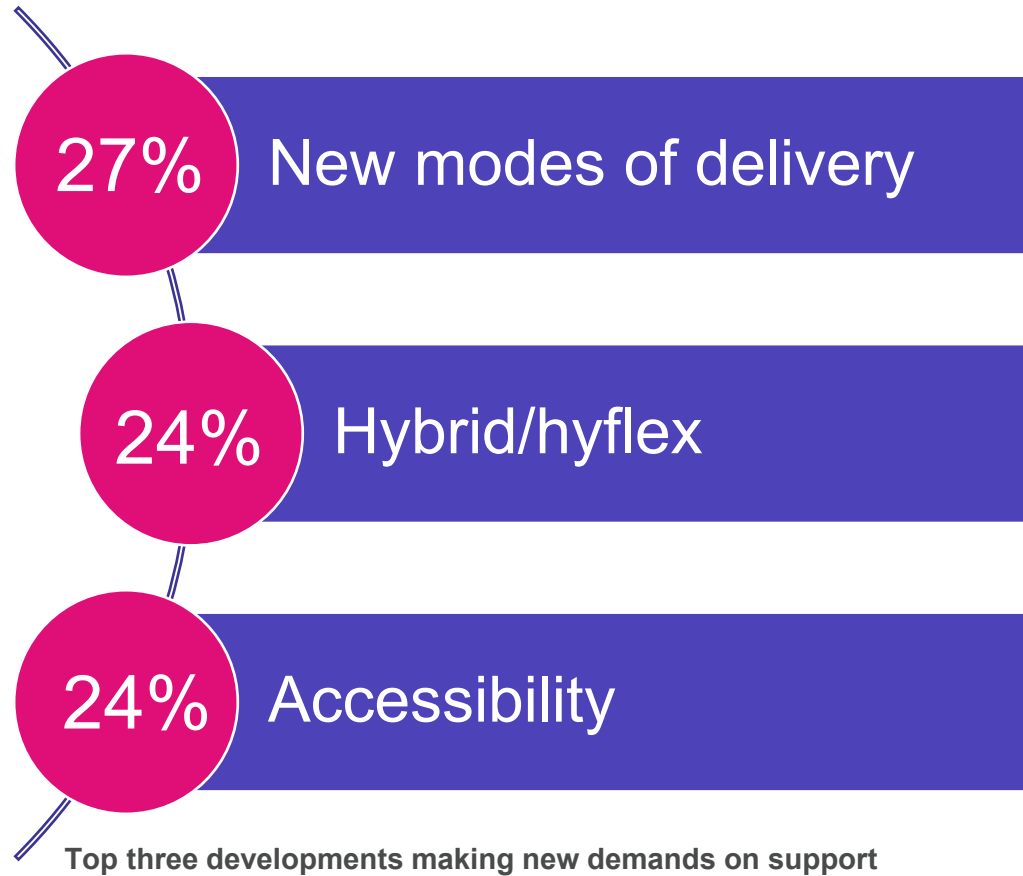
54% of institutions reported an increase in the number of permanent TEL staff over the last two years and 23% reported an increase in fixed term staffing. 39% also reported that there had been a change of existing roles/incorporation of other duties. The Covid-19 pandemic was noted as the top reason for influencing the changes in staff provision over the past two years.

[\[Question 3.1\]](#)

Further staffing changes are expected, with more than one-third of respondents foreseeing an increase in the number of permanent staff over the next two years.

[\[Question 3.3\]](#)

# Summary: Developments making new demands on support



The impact of the Covid-19 pandemic is evident in new support demands, with 27% of institutions reporting support demands from new modes of course delivery; e.g. blended/online, and 24% noting a focus on delivering hybrid or hyflex teaching.

Accessibility continues to make demands on support, in terms of raising awareness of accessibility requirements, providing support for captioning and creating accessible documents.

[\[Question 4.2\]](#)



## Main report

The main report is split into four sections and provides a summary of the data and a breakdown by institutional type and by country:

[Section 1 – TEL tools currently in use](#)

[Section 2 – Course delivery](#)

[Section 3 – TEL staffing](#)

[Section 4 – Future TEL developments](#)



## Section 1: Technology Enhanced Learning tools currently in use

This section focused on the TEL tools and services that are being used by institutions to support learning, teaching and assessment activities. It asked about centrally supported tools used by students, institutional reviews of TEL tools and their outcomes, and outsourcing of TEL tools.

# Section 1: TEL currently in use – Question 1.1

## **Question 1.1: Which centrally-supported TEL tools are used by students in your institution?**

Question 1.1 invited respondents to identify the range of TEL tools that are centrally provided for students.

The data for the top 12 tools is provided in [Table 1.1](#).

This question has been used in previous Surveys dating back to 2008. Some modifications have been made to the items available for selection. *Accessibility tools* is a new addition (entering outside of the top 12 with 71% of institutions reporting supported use).

Electronic essay exams has been replaced with *Digital exams system* (34%) and *Proctoring software* (18%).

This year's data shows a rise in the number of TEL tools being centrally-supported by institutions compared to 2020. For all the top 12 tools, the percentage of institutions reporting centrally-supported use of each tool is over 87% with 10 of the top 12 tools supported by 92% or more respondents. In comparison, for 2020, only one tool (the VLE) was supported by more than 90% of

institutions (91%). The remaining tools in the top 12 for 2020 were supported by 62%-87% of respondents.

When comparing the top 12 tools with 2020 data, in 2022 we see *ePortfolio*, *Electronic Management of Assignments (EMA)* and *Collaborative tools* all drop out of the top 12; however, it should be noted that the use of *Collaborative tools* rose 22% despite the drop in table position. New entries to the top 12 are *Media streaming systems* (in at joint 2nd), *Content management systems* (joint 5th) and *Digital/learning repositories* (11th). In 2020, these tools were 15th, 25th and 21st respectively. *Webinar/Virtual classroom* moves up to joint 2nd (99%) from joint 8th in 2020 (72%). *Text matching tools* and *Lecture capture tools* move down the most places (5 and 6 respectively) but the percentage of institutions reporting these tools as centrally supported has risen compared to 2020 (from 87% to 96% and from 81% to 87% respectively.)



## Section 1: TEL currently in use – Table 1.1

Response	Total		Type			Country			
	No	%	Pre-92	Post-92	Other	Eng	Wal	Scot	NI
<i>(Base: All respondents)</i>		(76)	(39)	(32)	(5)	(63)	(6)	(6)	(1)
<b>Virtual Learning Environment (VLE)</b>	76	100%	100%	100%	100%	100%	100%	100%	100%
<b>Formative eAssessment tools (e.g. VLE quiz)</b>	75	99%	97%	100%	100%	98%	100%	100%	100%
<b>Media streaming system (e.g. Kaltura, Medial, MS Stream, Panopto)</b>	75	99%	97%	100%	100%	98%	100%	100%	100%
<b>Webinar/virtual classroom (e.g. Blackboard Collaborate, MS Teams meetings, Zoom)</b>	75	99%	100%	97%	100%	98%	100%	100%	100%
<b>Asynchronous communication tools (e.g. discussion forums)</b>	74	97%	97%	97%	100%	97%	100%	100%	100%
<b>Content management systems (e.g. OneDrive, SharePoint, VLE)</b>	74	97%	97%	97%	100%	97%	100%	100%	100%
<b>Document sharing tool (e.g. Google Docs, Office 365)</b>	73	96%	97%	97%	80%	97%	100%	83%	100%
<b>Text matching tools (e.g. SafeAssign, Turnitin)</b>	73	96%	97%	100%	60%	95%	100%	100%	100%
<b>Summative eAssessment tools (e.g. VLE quiz)</b>	72	95%	95%	94%	100%	94%	100%	100%	100%
<b>Reading list management software (e.g. Leganto, Talis)</b>	70	92%	95%	91%	80%	92%	83%	100%	100%
<b>Digital/learning repository (e.g. ePrints, Equella, VLE)</b>	67	88%	85%	94%	80%	91%	100%	67%	0%
<b>Lecture capture tools ( e.g. Echo360, Panopto)</b>	66	87%	90%	88%	60%	87%	100%	67%	100%

Table 1.1: Centrally-supported software tools used by students – top 12.

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# Section 1: TEL currently in use – Question 1.2

Response	Total		Type			Country			
	No	%	Pre-92	Post-92	Other	Eng	Wal	Scot	NI
<i>(Base: All respondents)</i>		(76)	(39)	(32)	(5)	(63)	(6)	(6)	(1)
Yes	54	71%	69%	75%	60%	68%	83%	100%	0%
No	22	29%	31%	25%	40%	32%	17%	0%	100%

Table 1.2: Institutional review of TEL facility or system in last two years.

**Question 1.2: Has your institution undertaken a review of a major institutional TEL facility or system in the last two years?**

At a similar level to the 2020 Survey, 71% of responding institutions reported that a TEL review had been conducted in the last two years.

TEL review activity is broadly similar across the institution types. Compared to 2020, Pre-92 institutions had the same results reported, Post-92 institutions conducted more reviews at 75% (compared to 70% in 2020), and Other institutions conducted fewer reviews at 60% (down from 73% in 2020).

## Section 1: TEL currently in use – Question 1.3

Response	Total		Type			Country			
	No	%	Pre-92	Post-92	Other	Eng	Wal	Scot	NI
<i>(Base: All respondents that have undertaken a review)</i>		(54)	(27)	(24)	(3)	(43)	(5)	(6)	(0)
VLE	37	69%	70%	67%	67%	65%	100%	67%	0%
Polling tools	22	41%	41%	42%	33%	42%	20%	50%	0%
Digital Accessibility tools	20	37%	41%	25%	100%	37%	0%	67%	0%
Lecture capture	19	35%	22%	46%	67%	33%	40%	50%	0%
Digital exams system	17	32%	41%	25%	0%	35%	20%	17%	0%
Learning analytics	16	30%	30%	29%	33%	23%	60%	50%	0%

Table 1.3: TEL facilities or systems that have been reviewed in the last two years – top six.

### Question 1.3: Which major TEL facilities or systems have you reviewed in the last two years?

VLE reviews remain the most conducted type of review, retaining the top position since the 2016 Survey (when this question was introduced). The percentage of respondents reporting a review of the VLE falls though, from 77% in 2020 to 69%.

Compared to 2020 responses, *Polling tools* rise to 2nd from 5th with *Lecture Capture* dropping from 2nd in 2020 to 4th. A new response option for the 2022 Survey is *Digital exams system* which enters at 5th. *Learning Analytics* rises from 9th in 2020 to 6th. *ePortfolio* drops out of the top five for 2022 (falling to joint 11th position).

## Section 1: TEL currently in use – Question 1.4

Response	System					
	VLE	Polling tools	Digital Accessibility tools	Lecture capture	Digital exams system	Learning analytics
<i>(Base: All respondents that have undertaken a review)</i>	(37)	(22)	(20)	(19)	(17)	(16)
Review still in progress	16%	27%	20%	16%	41%	31%
Continue with current system	16%	9%	0%	32%	0%	13%
Implementation/pilot of new system	19%	50%	70%	42%	35%	50%
Upgrade current system	24%	5%	5%	0%	18%	0%
Move to external hosting for current system	19%	0%	0%	5%	0%	0%
Other	3%	5%	5%	5%	6%	6%
Not answered	3%	5%	0%	0%	0%	0%

Table 1.4: Outcomes of the review – top six systems reviewed in the last two years.

### Question 1.4: What was the outcome of the review on these TEL facilities or systems?

Following VLE reviews, the majority of institutions (24%) are upgrading the current system which was the same top result in 2020.

For *Polling tools*, *Digital accessibility tools*, *Lecture capture* and *Learning analytics*, most respondents chose to implement or pilot a new system following their review. From across all tool types, and as in 2020 results, *Digital accessibility tools* had the highest number of respondents choosing a new system (70%).

*Digital exams system* reviews are still mostly in progress (42%) although 35% have chosen to implement/pilot a new system.

# Section 1: TEL currently in use – Question 1.5

Response	Total		Type			Country			
	No	%	Pre-92	Post-92	Other	Eng	Wal	Scot	NI
<i>(Base: All respondents)</i>		(76)	(39)	(32)	(5)	(63)	(6)	(6)	(1)
Planning a review in the next two years	53	70%	70%	72%	60%	73%	67%	50%	0%
Not planning a review in the next two years	23	30%	31%	28%	40%	27%	33%	50%	100%

Table 1.5: Planning an institutional review of TEL facility or system in next two years.

**Question 1.5: Is your institution planning to undertake a review of a major institutional TEL facility or system within the next two years?**

Table 1.5 shows that 70% of responding institutions are planning to conduct TEL reviews within the next two years, which is up from 62% in 2020 and is the highest percentage since the introduction of this question in the 2014 Survey.

[Question 1.6](#) goes on to identify which systems are planned for review.

## Section 1: TEL currently in use – Question 1.6

Response	Total		Type			Country			
	No	%	Pre-92	Post-92	Other	Eng	Wal	Scot	NI
<i>(Base: All respondents planning a review)</i>		(53)	(27)	(23)	(3)	(46)	(4)	(3)	(0)
VLE	28	53%	37%	65%	100%	52%	50%	67%	0%
Lecture capture	20	38%	41%	35%	33%	35%	50%	67%	0%
ePortfolio	18	34%	26%	39%	67%	30%	25%	100%	0%
Learning analytics	17	32%	33%	35%	0%	28%	50%	67%	0%
eAssessment (e.g. quizzes)	15	28%	30%	30%	0%	26%	50%	33%	0%
Digital exams system	14	26%	37%	17%	0%	24%	50%	33%	0%
Electronic Management of Assignments (EMA)	12	23%	26%	22%	0%	22%	25%	33%	0%
Proctoring software	10	19%	19%	22%	0%	20%	25%	0%	0%
Webinar platform	10	19%	19%	17%	33%	17%	25%	33%	0%
Other	10	19%	19%	22%	0%	20%	25%	0%	0%

Table 1.6: TEL facilities or systems to be reviewed in the next two years – top ten.

### Question 1.6: Which major TEL facilities or systems are you planning on reviewing in the next two years?

The VLE (53%), Lecture capture (38%) and ePortfolio (34%) remain the most common systems to be the focus of a forthcoming review, with *Digital accessibility tools* (11%) dropping out of the top 10 to be replaced by *Learning analytics* (32%) in 4th place.

New response options for this year, *Digital exams system* (26%) and *Proctoring software* (19%) both enter straight into the top 10.

# Section 1: TEL currently in use – Figure 1.6



New for 2022, [Question 1.6](#) proceeded to ask respondents to provide reasons for their planned reviews. 49 institutions gave 180 open text responses in total for all platforms.

The various reasons given have been categorised into the 21 themes identified in Figure 1.6 and provided in order of frequency, where n= no. of times the theme was counted.

The top three reasons for conducting a review are as part of a regular or wider review, consolidation of multiple platforms and to align with institutional strategy.

Figure 1.6: Reasons for planning a review of a TEL service.

## Section 1: TEL currently in use – Question 1.7

Response	Total		Type			Country			
	No	%	Pre-92	Post-92	Other	Eng	Wal	Scot	NI
<i>(Base: All respondents)</i>		(76)	(39)	(32)	(5)	(63)	(6)	(6)	(1)
Digital exams system (e.g. Inspira, Wiseflow)	20	26%	28%	28%	0%	29%	17%	17%	0%
Learning analytics tools (e.g. Jisc Data Explorer, SolutionPath, VLE)	17	22%	23%	25%	0%	24%	33%	0%	0%
Not planning on implementing or piloting any over the next two years	15	20%	13%	22%	60%	21%	17%	17%	0%
Accessibility tools (e.g. Blackboard Ally, Yuja Panorama)	14	18%	21%	13%	40%	19%	17%	17%	0%
Other centrally-supported TEL tool	12	16%	18%	16%	0%	16%	17%	17%	0%
Proctoring software (e.g. Examity, Proctorio, ProctorFree)	11	15%	15%	16%	0%	16%	17%	0%	0%
Collaborative tools (e.g. Discord, MS Teams, Slack)	10	13%	15%	13%	0%	13%	17%	17%	0%
ePortfolio (e.g. Mahara, PebblePad)	10	13%	18%	9%	0%	14%	17%	0%	0%
Electronic Management of Assignments (EMA)	10	13%	21%	6%	0%	14%	17%	0%	0%
Personal response systems (including handsets or web-based apps) (e.g. Mentimeter, Poll Everywhere, TurningPoint, Vevox)	9	12%	13%	13%	0%	11%	33%	0%	0%

Table 1.7: Centrally-supported software planning on implementing – top ten.

**Question 1.7: Which, if any, of the following TEL tools are you planning on implementing or piloting on a centrally-supported basis over the next two years to add to those already available?**

This year's data features some significant differences from responses in 2020 when this question was introduced. *Digital exams system* (26%) goes straight to 1st place as a new item, with *Accessibility tools* (18%) and *Proctoring software* (15%) - also new items - placing 4th and 6th respectively.

Institutions *not planning on implementing or piloting any over the next two years* has moved from last place in 2020 to 3rd place this year (20%).

## Section 1: TEL currently in use – Question 1.8

Response	Total		Type			Country			
	No	%	Pre-92	Post-92	Other	Eng	Wal	Scot	NI
<i>(Base: All respondents)</i>		(76)	(39)	(32)	(5)	(63)	(6)	(6)	(1)
VLE platform – supporting the delivery of blended learning courses	60	79%	74%	84%	80%	76%	100%	83%	100%
Lecture capture platform	57	75%	74%	75%	80%	71%	100%	83%	100%
VLE platform – supporting the delivery of fully online courses	56	74%	72%	75%	80%	70%	100%	83%	100%
Media streaming	53	70%	74%	63%	80%	68%	100%	50%	100%
Virtual classroom	45	59%	67%	53%	40%	54%	100%	67%	100%
ePortfolio	38	50%	33%	69%	60%	51%	50%	50%	0%
Digital repositories (eg. Google Drive, Google Docs)	37	49%	49%	50%	40%	48%	83%	33%	0%
VLE platform – supporting the delivery of open online courses	36	47%	51%	44%	40%	51%	50%	17%	0%
Learning analytics	25	33%	26%	41%	40%	29%	83%	33%	0%
Other service	6	8%	10%	6%	0%	5%	17%	33%	0%
No outsourced provision	5	7%	8%	6%	0%	6%	0%	17%	0%

Table 1.8: Institutional services that are currently outsourced

**Question 1.8: Does your institution currently outsource its provision of any of the following? Provision refers to an institutional service being hosted by another organisation.**

The outsourcing of provision has grown across the board since the 2020 Survey, with 93% of institutions now outsourcing the provision of TEL services compared to 83% in 2020.

*VLE platform – supporting the delivery of blended learning courses* (79%) has jumped to the top of the table from 3rd position (38%) in 2020. *VLE platform – supporting the delivery of fully online courses* rises from 36% in 2020 to 74% (up from 4th to 3rd). The greatest reported increase is in *Media streaming*, which was 26% in 2020 and now stands at 70%. New for 2022, *Virtual classroom* (59%) enters at 5th place, just below *Media streaming*.

## Section 1: TEL currently in use – Question 1.9

Response 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	
	No.	Total	No.	Total	No.	Total
(Base: All respondents outsourcing service)						
VLE platform – supporting the delivery of blended learning courses (n=60)	21	35%	39	65%	0	0%
Lecture capture platform (n=57)	12	21%	44	77%	1	2%
VLE platform – supporting the delivery of fully online courses (n=56)	19	34%	37	66%	0	0%
Media streaming (n=53)	12	23%	40	76%	1	2%
Virtual classroom (n=45)	5	11%	39	87%	1	2%
ePortfolio (n=38)	17	45%	20	53%	1	3%
Digital repositories (eg. Google Drive, Google Docs) (n=37)	5	14%	29	78%	3	8%
VLE platform – supporting the delivery of open online courses (n=36)	8	22%	24	67%	4	11%
Learning analytics (n=25)	7	28%	16	64%	2	8%
Other service (n=6)	2	33%	4	67%	0	0%

Table 1.9: How the institutional services identified in Question 1.8 are currently outsourced.

### Question 1.9: How is the provision of these services currently outsourced?

*Virtual classroom* was added as a response item to this question for the 2022 Survey with 87% of institutions adopting a SaaS approach for this provision. *Other service* was also added and shows a similar preference of SaaS (67%) over institutionally managed (33%).

Of the eight response items that featured in the 2020 Survey, only two have seen some reduction in SaaS - *ePortfolio* is now 53% SaaS compared to 61% in 2020, and *Lecture capture* is now 77% SaaS compared to 82% in 2020. Of the other six, some degree of movement towards SaaS is evident – most notably in *VLE platform – supporting the delivery of fully online courses* (now 67% SaaS compared to 50% in 2020), and in *Learning analytics* (now 64% SaaS compared to 50% in 2020).

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## Section 2: Course delivery

This section considered how TEL tools are being used in institutions; complementing the focus in Section 1 on which TEL tools are being used. In particular, the questions aimed to understand the types of courses being offered - blended, online, hybrid/hyflex and open - and the extent to which individual tools are being used across their institution, culminating in the identification of a '[TEL toolkit](#)' with the most used tools.



## Section 2: Course delivery – Question 2.1

### Question 2.1: Does your institution offer any of the following types of programmes or courses?

This is the fourth Survey to use this question format, which was updated in 2016 to use the more commonly understood categories of *blended*, *fully online* and open modes of delivery, and again in 2022 to include a *hybrid/hyflex* category. The question invites respondents to indicate how TEL is being used for each mode of course delivery, estimating the extent to which this activity is taking place across their institution.

The categories of course delivery are described as follows:

- a) **Blended learning (supplementary):** lecture notes and supplementary resources for courses studied in class are available;
- b) **Blended learning:** parts of the course are studied in class and other parts require students to engage in active learning online (e.g., engaging in

collaborative or assessed tasks);

- c) **Hybrid/HyFlex:** the programme enables students to attend live classes either in person or online
- d) **Fully online courses;**
- e) **Open online learning courses for all students at your institution:** internal access only;
- f) **Open online boundary courses:** free external access to the course materials for the public, but assessment restricted to students registered at your institution only;
- g) **Open online learning courses for public:** free external access;
- h) **Other** – free-text responses.

*Blended learning (supplementary)*, focusing on the provision of lecture notes and supplementary resources to students, remains the most common use of TEL. In the 2022 Survey 81% of respondents reported this approach being used extensively across their institution - compared to 79% in 2020 and 73% in 2018.

More active modes of *Blended learning* are used extensively across the institution in 36% of cases, rising from the 20% recorded in 2020. 45% of Post-92 institutions support this mode extensively, compared with 34% of Pre-92 institutions. With respect to use across some Schools/departments the overall response rates have increased since the last Survey (49% in 2022, compared to 40% in 2020); however, there are some differences between the institution types with Post-92 institutions at 50% in 2022 (46% in 2020) and Pre-92 institutions at 42% (37% in 2020). The third most common category is *fully online delivery*, with 9% of respondents reporting that their institutions support this extensively, an increase from the 5% in 2020, and 61% of respondents doing this across some schools/departments, up from the 51% recorded in 2020. *Hybrid/HyFlex delivery* is not yet well established across the sector, with 9% of respondents reporting that they support this extensively and only 28% doing this across some schools/departments.

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## Section 2: Course delivery – Figure 2.1

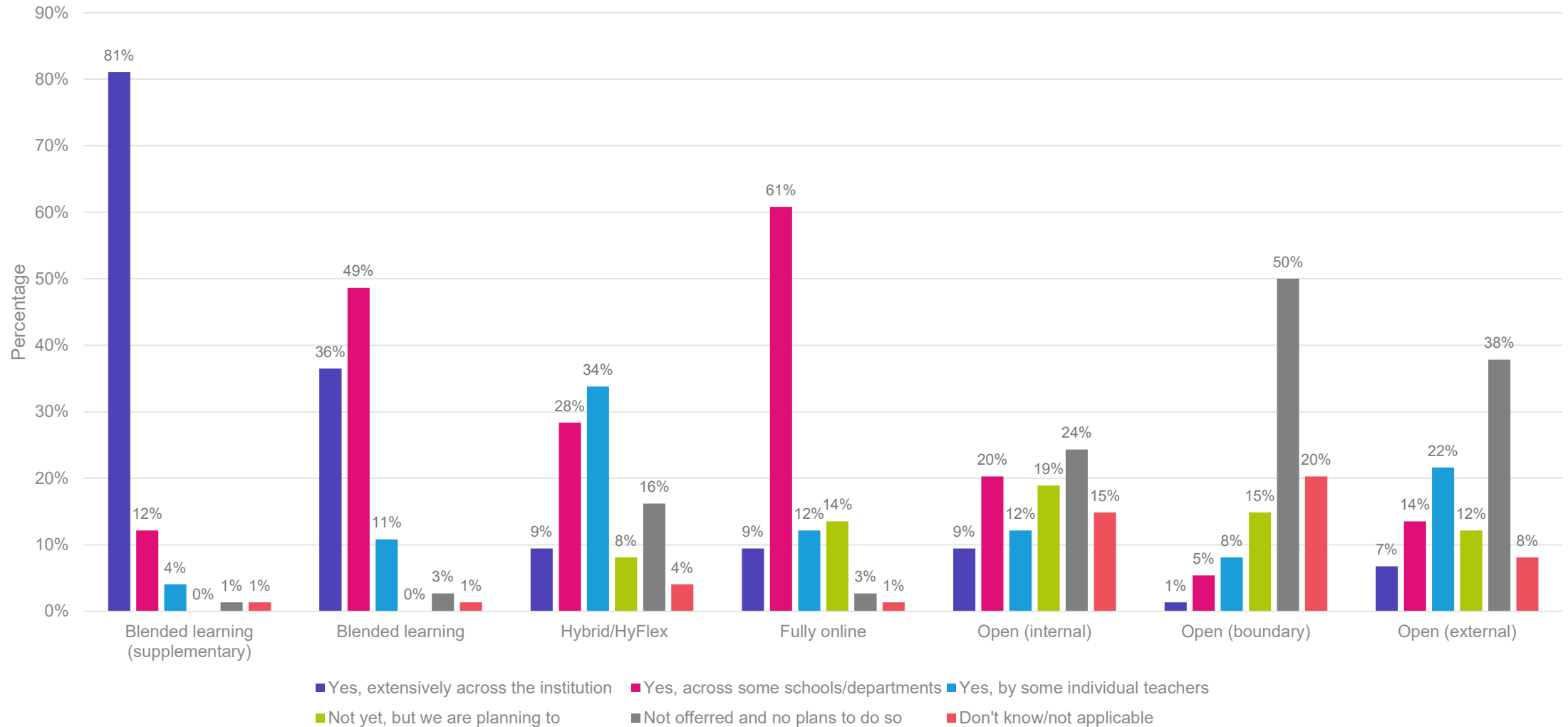


Figure 2.1: Percentage of institutions offering the categories of course delivery described in [Question 2.1](#) and the level of use across the institution.

## Section 2: Course delivery – Table 2.1

	Blended learning (supplementary)	Blended learning	Hybrid/HyFlex	Fully online	Open (internal)	Open (boundary)	Open (external)
<i>(Base: All respondents)</i>	(74)	(74)	(74)	(74)	(74)	(74)	(74)
Yes, extensively across the institution	81%	36%	9%	9%	9%	1%	7%
Yes, across some Schools / departments	12%	49%	28%	61%	20%	5%	14%
Yes, by some individual teachers	4%	11%	34%	12%	12%	8%	22%
Not yet, but we are planning to	0%	0%	8%	14%	19%	15%	12%
Not offered and no plans to do so	1%	3%	16%	3%	24%	50%	38%
Don't know/not applicable	1%	1%	4%	1%	15%	20%	8%

Table 2.1: Percentage of institutions offering the categories of course delivery described in [Question 2.1](#) and the level of use across the institution.

## Section 2: Course delivery – Question 2.2

TEL tool	Proportion of courses using TEL tool							
<i>(Base: all respondents, 74)</i> Row percentages	100%	75%-99%	50%-74%	25%-49%	5%-24%	1%-4%	0%	Don't Know
Virtual Learning Environment (VLE) (e.g. Blackboard, Brightspace, Canvas, Moodle)	72%	23%	1%	0%	0%	0%	0%	4%
Content Management Systems (e.g. OneDrive, SharePoint, VLE)	41%	28%	4%	8%	8%	3%	1%	7%
Digital / learning repository (e.g. ePrints, Equella, VLE)	39%	16%	7%	5%	5%	4%	7%	16%
Electronic Management of Assignments (EMA)	30%	32%	4%	0%	1%	0%	16%	16%
Reading list management software (e.g. Leganto, Talis)	30%	32%	14%	11%	0%	1%	5%	7%
Accessibility tools (e.g. Blackboard Ally, Yuja Panorama)	26%	20%	8%	4%	8%	3%	16%	15%
Webinar/virtual classroom (e.g. Blackboard Collaborate, MS Teams meetings, Zoom)	24%	34%	15%	9%	5%	0%	3%	9%
Lecture capture tools (e.g. Echo360, Panopto)	22%	39%	13%	11%	4%	0%	4%	7%
Media streaming system (e.g. Kaltura, Medial, MS Stream, Panopto)	22%	30%	13%	13%	9%	7%	1%	4%
Text matching tools (e.g. Safe Assign, Turnitin, Urkund)	20%	54%	11%	3%	3%	1%	1%	7%

**Question 2.2: Approximately, what proportion of courses within your institution use each of the following TEL tools?**

This question aims to track the extent of TEL usage in courses across institutions; it uses a list of tools which has been updated and based on responses from participants.

Table 2.2 captures the leading TEL tools which are being used by institutions to support teaching and learning practices. The top ten tools listed in this 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 by respondents of the proportion of courses using TEL tools within their institutions.

## Section 2: Course delivery – Figure 2.2

TEL tool	Year	Proportion of courses using TEL tool							
		100%	75%-99%	50%-74%	25%- 49%	5%-24%	1%-4%	0%	Don't Know
<i>(Base: All respondents, 94)</i>		100%	75%-99%	50%-74%	25%- 49%	5%-24%	1%-4%	0%	Don't Know
Virtual Learning Environment (VLE)	2020	61	34	3	0	0	0	0	2
	2022	72	23	1	0	0	0	0	4
Text matching tools (e.g. SafeAssign, Turnitin, Urkund)	2020	19	51	16	6	1	1	3	3
	2022	20	54	11	3	3	1	1	7
Reading list management software	2020	17	37	15	7	2	3	12	7
	2022	30	32	14	11	0	1	5	7
Lecture capture tools	2020	7	18	14	19	20	9	8	6
	2022	22	39	14	11	4	0	4	7
Content Management System	2020	9	6	1	7	10	11	18	38
	2022	41	28	4	8	8	3	1	7
Webinar	2020	0	2	3	10	38	23	7	17
	2022	24	34	15	9	5	0	3	9

Figure 2.2: Comparison of 2022 data with 2020 showing a heat map of the proportion of courses using the top six TEL tools.



## Section 3: TEL staffing



This section asked respondents how staffing levels within TEL teams have changed in the past two years, the reasons for those changes and to consider their future plans to change staffing.

## Section 3: TEL staffing – Questions 3.1 and 3.2

### **Question 3.1: What changes in staffing provision for supporting TEL, if any, have been made over the last two years?**

The data in [Table 3.1](#) demonstrates that the vast majority (95%) of institutions made changes to their TEL staffing provision, a higher level than the 79% reported in 2020.

[Table 3.1](#) summarises the top five changes made over the last two years. An increase in the number of permanent staff is at the top at 54%, demonstrating a 15% increase from the 40% reported in 2020. This increase is higher for Pre-92 (from 55% to 61%) and Other institutions (from 46% to 80%) than Post-92 institutions which showed a decrease (55% from 42%).

### **Question 3.2: Why have these changes been made?**

Question 3.2 asked respondents to provide reasons for the changes that had been identified in Question 3.1.

The reasons given for the changes in staffing are categorised into the following themes (in order of frequency):

- Covid-19 pandemic
- New technology portfolio/pedagogies
- Sector funding/budget constraints
- Restructure/leadership change
- Support online provision
- Organisational structures
- TEL support
- Increase in student numbers

The Covid-19 pandemic was reported as the top reason for influencing the changes in staff provision over the past two years. In some cases, respondents specifically noted that the staffing changes were influenced by the introduction of new technologies, expanded technology portfolios (e.g., Zoom, Digital assessment platform), and investment in digital pedagogies which occurred during the pandemic.

Some institutions reported that their staffing provision had been impacted by sector funding and budget constraints, and in some cases, this resulted in a recruitment freeze.

Restructures have also influenced staffing provision changes, for example realigning teams supporting TEL to better support the institution's needs. Other organisational changes such as secondments and changes to roles/duties were introduced to better support TEL provision in response to the pandemic and new strategic priorities.

Several institutions reported that a strategic focus on online provision influenced staffing changes, with new staff, such as learning designers, brought in to introduce or expand online provision.

Two institutions reported that an increase in student numbers led to increases in their TEL staffing provision.

## Section 3: TEL staffing – Table 3.1

Response	Total		Type			Country			
	No	%	Pre-92	Post-92	Other	Eng	Wal	Scot	NI
<i>(Base: All respondents)</i>		(74)	(38)	(31)	(5)	(61)	(6)	(6)	(1)
Increase in the number of permanent staff	40	54%	61%	42%	80%	54%	50%	50%	100%
Change of existing roles/incorporation of other duties	29	39%	45%	32%	40%	38%	33%	67%	0%
Restructure of department(s)/TEL provision	25	34%	32%	35%	40%	30%	17%	100%	0%
Increase in the number of fixed-term staff (e.g. contract of 6 months or longer)	17	23%	29%	61%	0%	21%	50%	17%	0%
Recruitment delay/freeze	15	20%	13%	32%	0%	21%	0%	33%	0%
Reduction in the number of staff	12	16%	16%	19%	0%	15%	17%	33%	0%
Increase in the number of temporary staff for emergency cover (e.g. short-term contract up to 6 months)	12	16%	18%	16%	0%	16%	0%	33%	0%
Other	7	10%	8%	13%	0%	10%	0%	17%	0%
Have not been any changes in staffing provision over the last two years	4	5%	3%	7%	20%	7%	0%	0%	0%

Table 3.1: Changes made in staffing provision for supporting TEL over the last two years.

## Section 3: TEL staffing – Question 3.3

Response	Total		Type			Country			
	No	%	Pre-92	Post-92	Other	Eng	Wal	Scot	NI
<i>(Base: All respondents)</i>		(74)	(38)	(31)	(5)	(61)	(6)	(6)	(1)
Increase in the number of permanent staff	25	34%	42%	23%	40%	31%	33%	50%	100%
Anticipate change, but unsure as to how it might change	18	24%	21%	26%	40%	26%	17%	17%	0%
Change of existing roles/incorporation of other duties	15	20%	21%	23%	10%	20%	0%	50%	0%
Increase in the number of fixed-term staff (e.g. contract of 6 months or longer)	12	16%	18%	10%	40%	13%	0%	67%	0%
Restructure of department(s)/TEL provision	8	11%	13%	10%	0%	11%	0%	17%	0%

Table 3.3: Changes foreseen in staffing provision for supporting TEL in the near future – top five.

### Question 3.3: Do you foresee changes in the staffing provision for supporting TEL in the near future?

The most common prediction is that there will be an increase in the number of permanent staff, indicating that TEL teams will continue to grow in the near future. The top five responses, shown in Table 3.3, appear to be consistent with the 2020 results, the only difference being a new entry of: *Increase in the number of fixed-term staff* which was a new response item for 2022.

Cross referencing the data from Question 3.3 with Question 3.1, 19 (48%) of the 40 institutions who reported an increase in permanent staff foresee a further increase in permanent staff, showing some institutions are continuing to grow their TEL teams. Of the 29 institutions reporting that a restructure had taken place, 11 (44%) foresee a change of roles or incorporation of other duties.

## Section 4:

# Future TEL developments

This section asked respondents about recent and prospective developments in TEL that have started to make new demands upon their institution in terms of the support required by users.



# Section 4: Future TEL developments – Question 4.1

Response	Total		Type			Country			
	No	%	Pre-92	Post-92	Other	Eng	Wal	Scot	NI
<i>(Base: All respondents)</i>		(74)	(38)	(31)	(5)	(61)	(6)	(6)	(1)
Yes	62	84%	89%	81%	60%	82%	100%	83%	100%
No	12	16%	11%	19%	40%	18%	0%	17%	0%

Table 4.1: Whether recent and prospective developments in technology have started to make new demands upon institutions in terms of the support required by users.

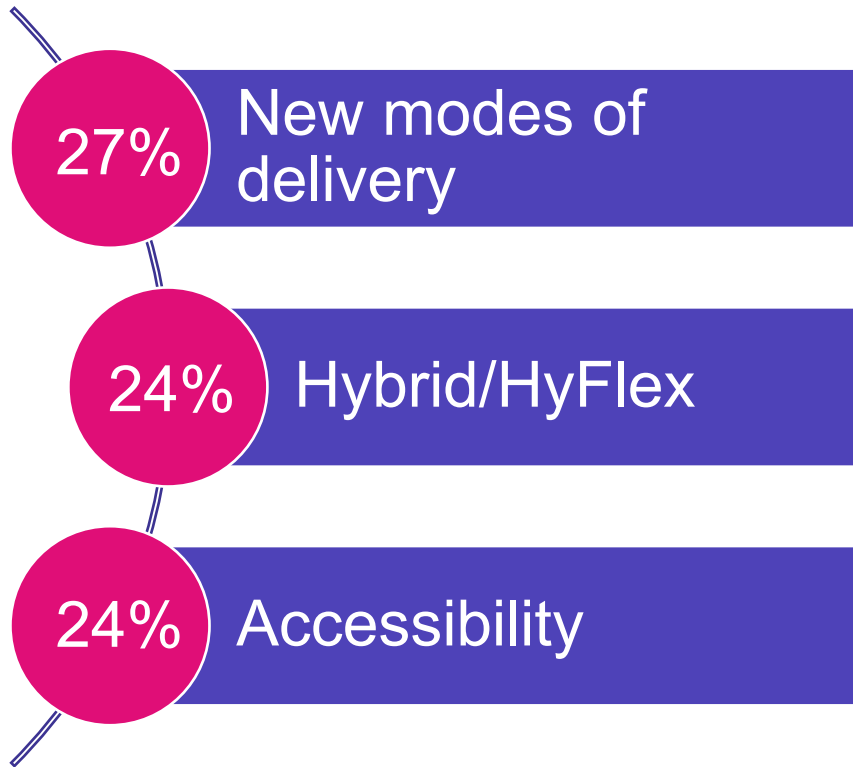
*Question 4.1: Have any recent and prospective developments in technology started to make new demands upon your institution in terms of the support required by users?*

Most respondents (84%) have indicated that there are prospective developments that are making demands.

Respondents were then invited to identify up to three important developments ([Question 4.2](#)).



## Section 4: Future TEL Developments – Question 4.2



*Question 4.2: Please write in 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 most important.*

The impact of the pandemic is evident in new support demands with institutions reporting support demands from new modes of course delivery (27%), e.g. blended or online learning, and a focus on delivering Hybrid or HyFlex teaching (24%).

Accessibility (24%) continues to make demands on support, in particular raising awareness of accessibility requirements, providing support for captioning and creating accessible documents.

Other key areas making new demands on support include e-assessment (19%), digital exams (16%) and learning analytics (16%).

Immersive environments (15%), in the form of augmented or virtual reality, have seen an increase from only one institution in 2020, to nine institutions in 2022.

Office 365 was in second place in 2020 but is now outside of the top eight in 9th place with six institutions reporting Microsoft Teams as making demands.

Considering the different types of institutions presented in [Table 4.2](#), there is a stronger demand for E-assessment and Digital exams within Pre-92 institutions, whilst Post-92 institutions are focusing more on Learning analytics.

## Section 4: Future TEL Developments - Table 4.2

Response	Total		Type			Country			
	No	%	Pre-92	Post-92	Other	Eng	Wal	Scot	NI
<i>(Base: All respondents that see demands)</i>		(62)	(34)	(25)	(3)	(50)	(5)	(6)	(1)
New modes of delivery (e.g. online/distance courses, active learning, blended learning, flipped classroom)	17	27%	26%	32%	0%	28%	20%	17%	100%
Accessibility	15	24%	29%	12%	67%	20%	40%	50%	0%
Hybrid/hyflex	15	24%	26%	24%	0%	22%	60%	17%	0%
E-assessment (e-submission, e-marking, e-feedback)	12	19%	26%	8%	33%	22%	20%	0%	0%
Digital exams	10	16%	26%	4%	0%	18%	20%	0%	0%
Learning Analytics (inc. ethics, use of data, reporting)	10	16%	9%	28%	0%	12%	20%	50%	0%
Immersive environments (e.g. AR/VR, simulation)	9	15%	9%	16%	67%	12%	0%	50%	0%
VLE (change/extend/baseline)	8	13%	15%	12%	0%	14%	0%	17%	0%

Table 4.2: Recent and prospective developments in technology that are starting to make new demands in terms of the support required by users - top eight.

## Further information



This report has been produced by members of the [UCISA Digital Education Group](#).

Previous Survey reports are available:

- [2020 Survey report](#)
- [2008-2018 Survey reports and case studies](#)

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