2020 Survey of Technology Enhanced Learning for higher education in the UK

ucisa Report Highlights

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Introduction

The tenth ucisa Survey of Technology Enhanced Learning (TEL) for higher education offers a longitudinal perspective of TEL developments over a 19-year period within UK institutions. The Report focuses on the current provision within universities and other higher education providers, and the emerging and planned patterns of learning technology usage across the UK HE sector.

The 2020 Survey retains a core set of questions from previous years to ensure longitudinal analysis, but also includes new areas based on sector developments. This includes accessibility, inclusive practice, partnerships for fully online learning and an expansion of the systems included in TEL reviews. The Survey was completed by institutions in early 2020, before institutions experienced the full impact of the Covid-19 pandemic and the rapid move to online learning, so the findings provide a useful snapshot of the pre-pandemic position of UK higher education institutions in relation to support for TEL.

In this document we present some of the highlights from the Survey. For more information please download the full report.
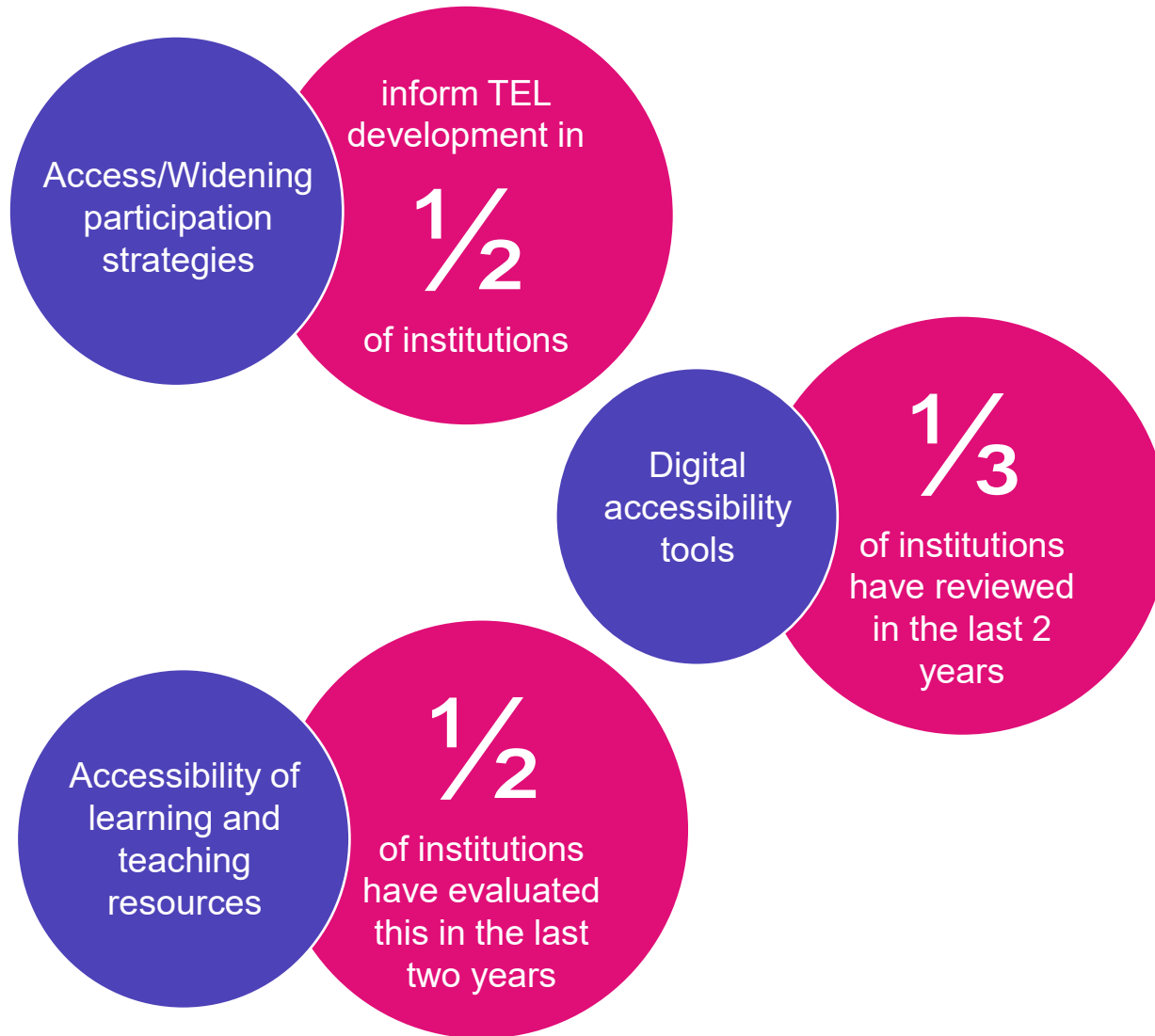
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Drivers for TEL development

3rd Widening participation/inclusiveness

↑ **5th** 2018

5th Meeting the requirements of the Equality Act (2010)

↑ **11th** 2018

6th Meeting the requirements of the Public Sector Bodies (Websites and Mobile Applications) (No.2) Accessibility Regulations

New Item

Recent legislative changes are impacting on TEL provision and development across the sector. Meeting the requirements of both the Equality Act (2010) and the Public Sector Bodies (Websites and Mobile Applications) (No.2) Accessibility Regulations 2018 are among the top seven drivers for TEL development alongside Widening participation/inclusiveness.
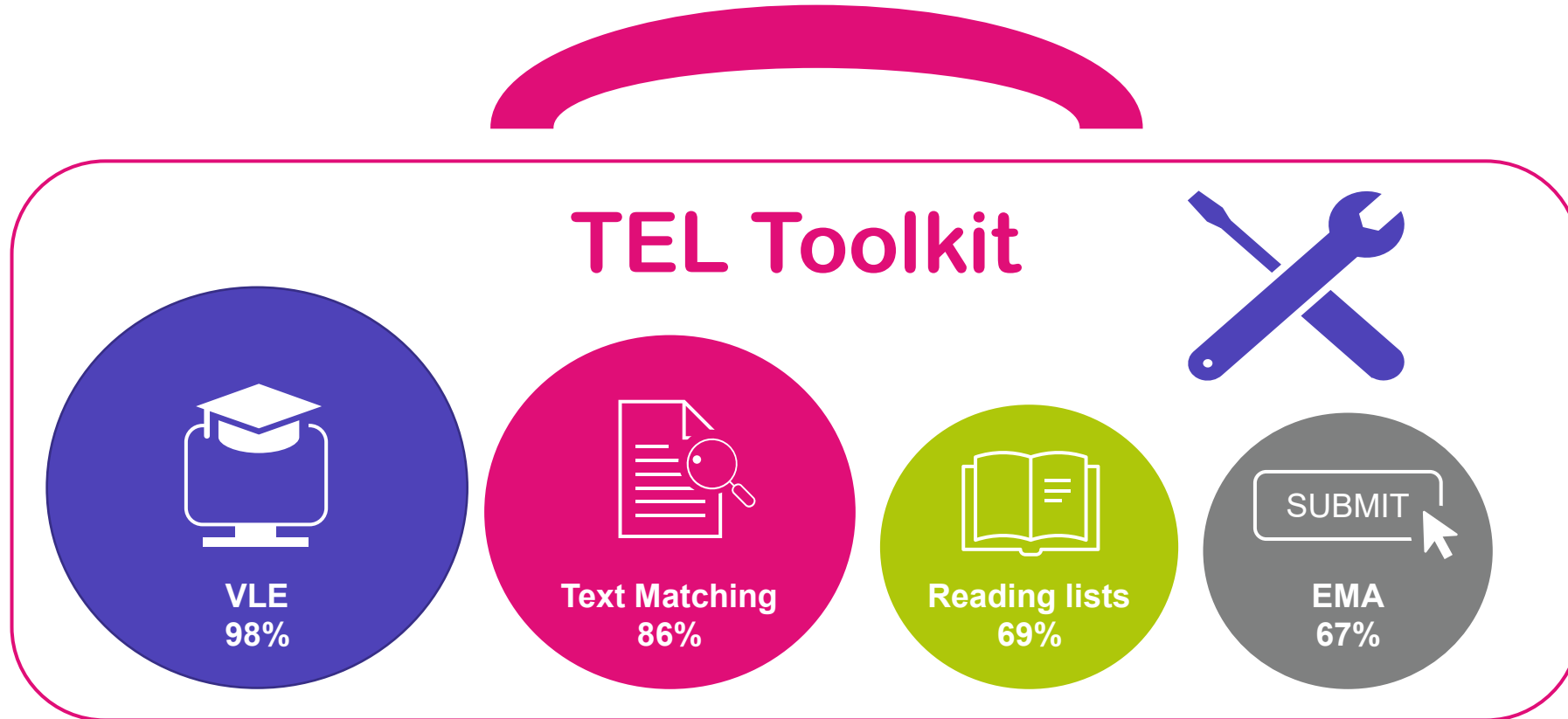
[Question 1.1]

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Legislative changes are having an impact

Access/Widening participation strategies

inform TEL development in

½

of institutions

Digital accessibility tools

⅓

of institutions have reviewed in the last 2 years

Accessibility of learning and teaching resources

½

of institutions have evaluated this in the last two years

Access/Widening Participation strategies inform the development of TEL in half of responding institutions. Half of respondents reported that they regularly evaluate the accessibility of learning and teaching resources, and more than one-third of respondents indicated they had reviewed digital accessibility tools over the last two years.
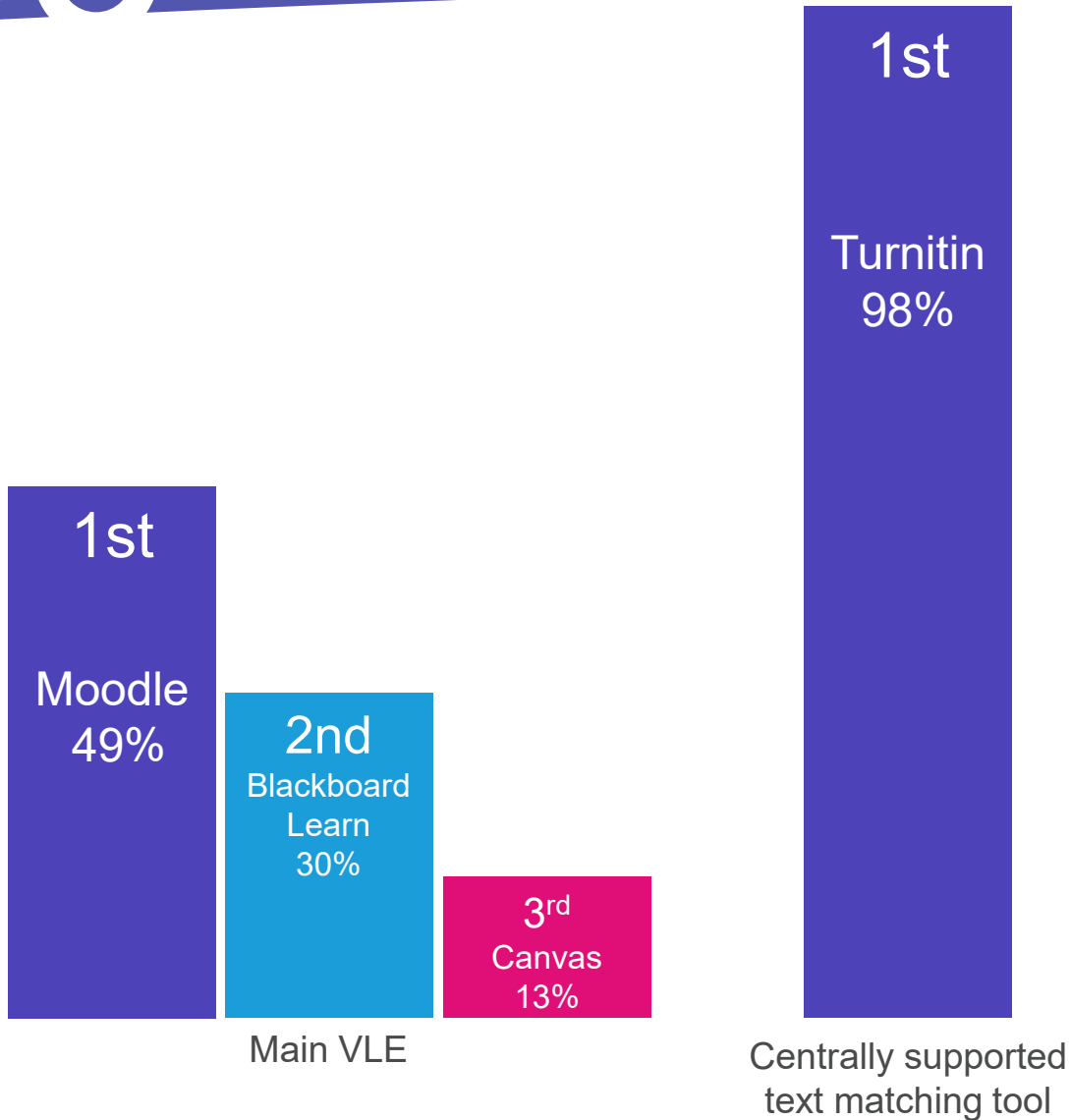
[Questions 2.1, 3.19, 4.14]

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What's in your TEL toolkit?

TEL Toolkit

| VLE 98% | Text Matching 86% | Reading lists 69% | EMA 67% |

A wide range of TEL tools are supported across institutions; however, VLEs, text matching tools, reading list management software and electronic management of assessment (EMA) tools are used more extensively across institutions, with figures showing the percentage of institutions where these tools are used in 50% or more of their courses.

[Question 4.11]
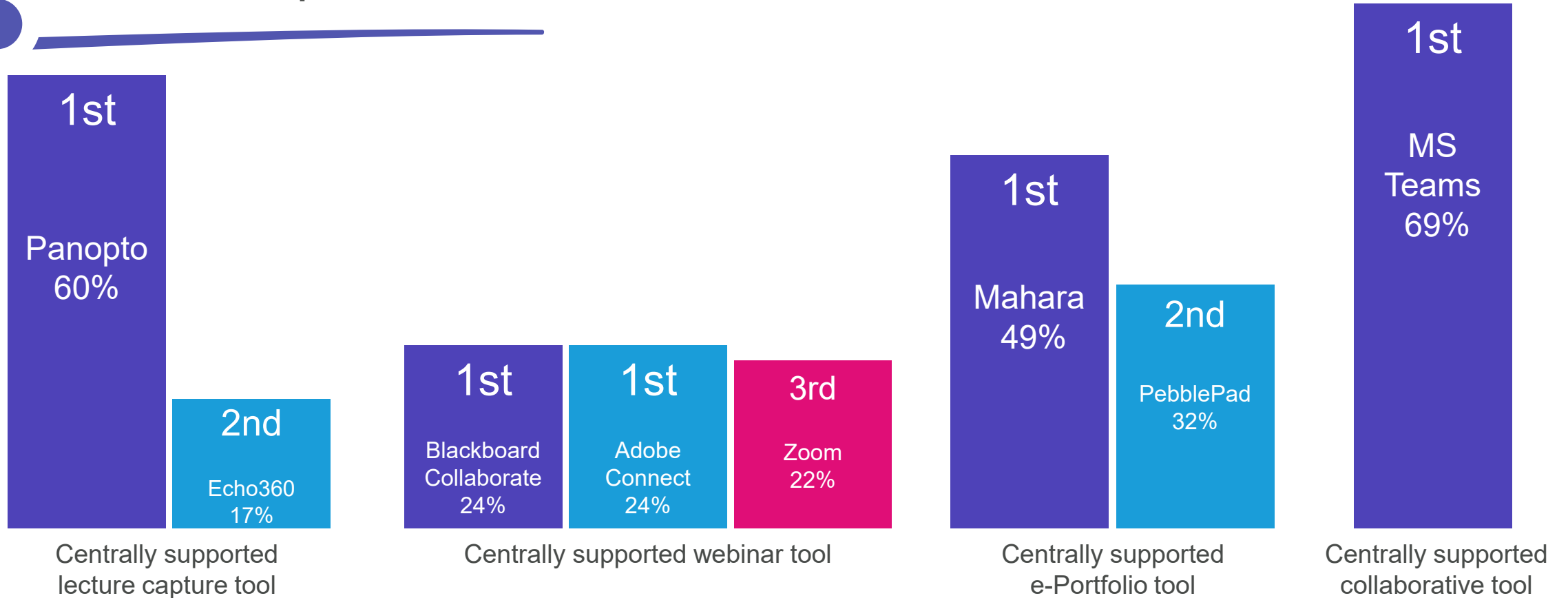
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Who's top of the tools?

These are the leading providers for the centrally supported technologies highlighted in the TEL toolkit. Moodle retains its lead as the most used main VLE. Turnitin continues to dominate the text-matching tools market. Talis has the market share for reading list tools. Turnitin also leads as the most used EMA tool.
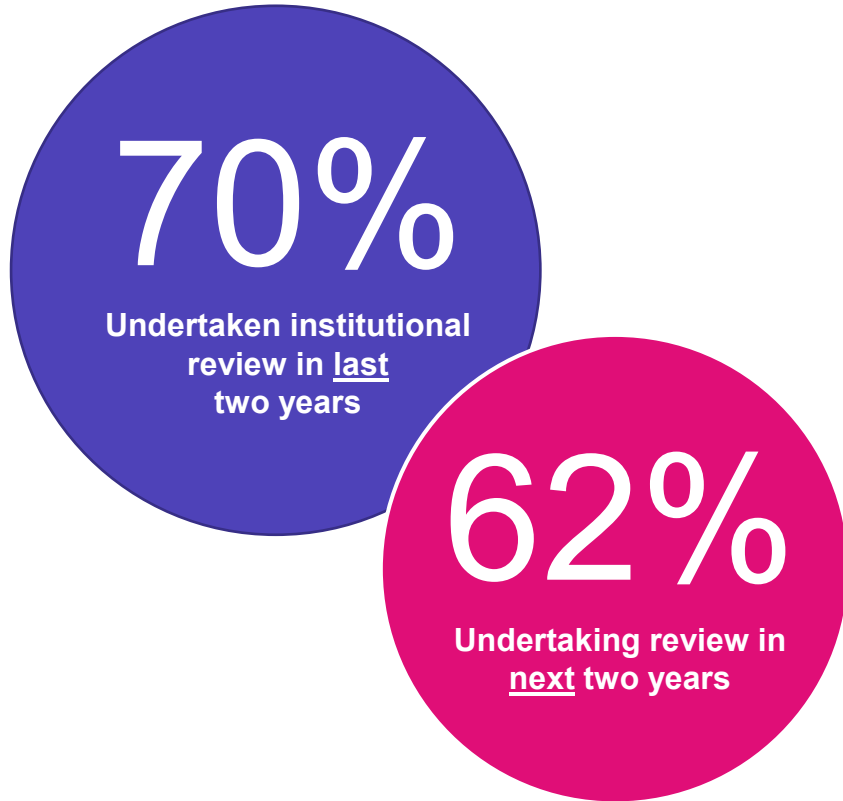
[Questions 3.3, 3.25]

1st
Turnitin
98%

1st
Moodle
49%

2nd
Blackboard Learn
30%

3rd
Canvas
13%

Main VLE

Centrally supported text matching tool

1st
Talis
62%

2nd
Leganto
18%

Centrally supported reading list tool

1st
Turnitin
57%

2nd
Moodle
33%

3rd
Blackboard
28%

Centrally supported EMA tool

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6

Who's top of the tools?

1st
Panopto
60%

2nd
Echo360
17%

Centrally supported lecture capture tool

1st
Blackboard Collaborate
24%

1st
Adobe Connect
24%

3rd
Zoom
22%

Centrally supported webinar tool

1st
Mahara
49%

2nd
PebblePad
32%

Centrally supported e-Portfolio tool

1st
MS Teams
69%

Centrally supported collaborative tool

These are the leading providers for centrally supported technologies from the top 12 list of tools. Panopto and Mahara retain top spot for lecture capture and e-Portfolio tools respectively. There is a mix of webinar platforms in use with three leading solutions. MS Teams has established a commanding lead in the new category of collaborative tools.
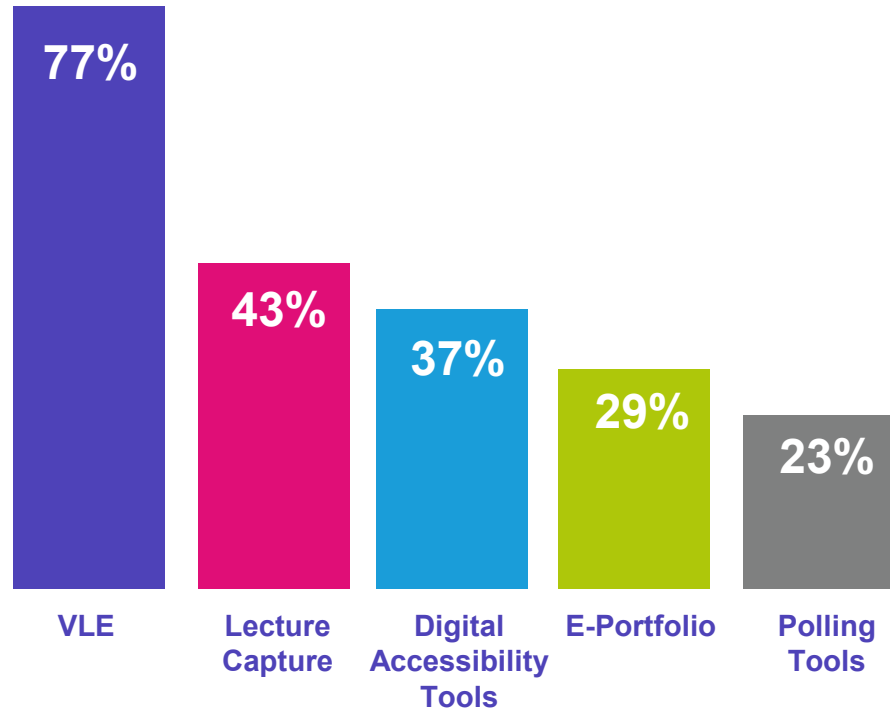
[Question 3.25]

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Institutional review of TEL Tools

70%
Undertaken institutional review in last two years

62%
Undertaking review in next two years

70% of respondents to the 2020 Survey have undertaken an institutional review of a TEL facility or system in the last two years, with almost two-thirds indicating they will be undertaking a review over the next two years.

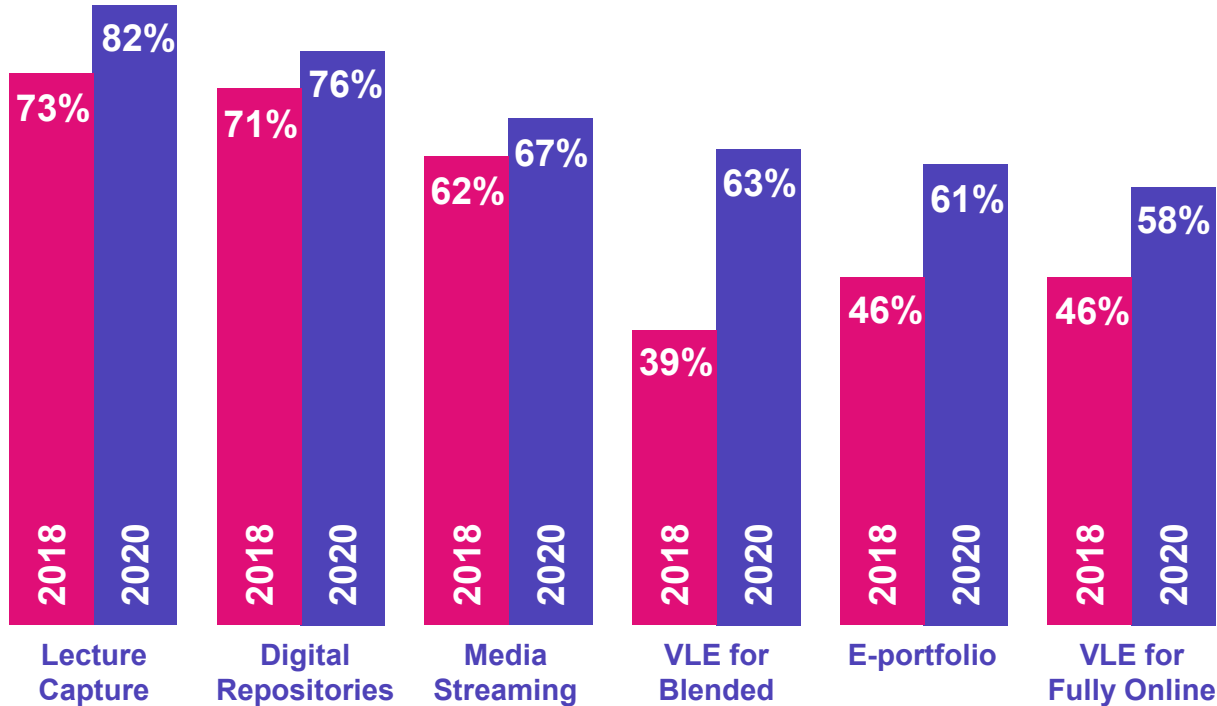[Questions 3.18, 3.21]

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Institutional review of TEL Tools

Just over three-quarters of institutions undertaking a review of their TEL tools reported that they had reviewed the VLE, while 43% reported they had reviewed the Lecture capture platform – retaining the positions of first and second held since the 2016 survey.
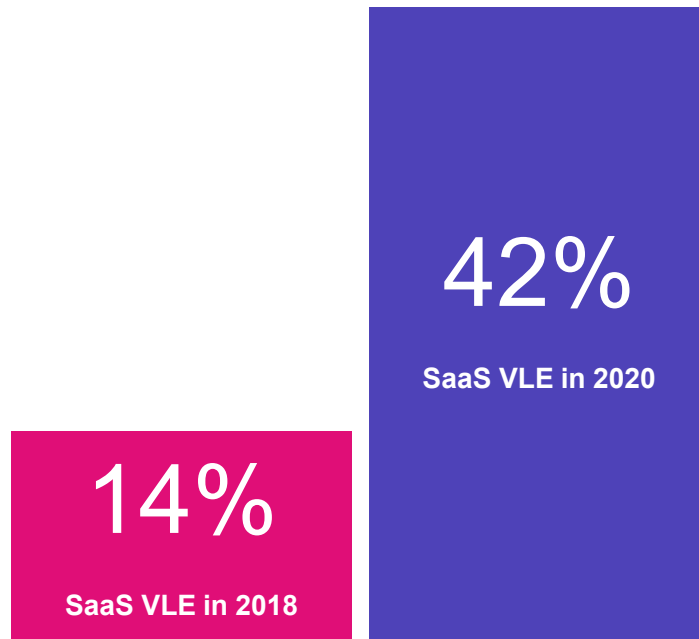
[Question 3.20]

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Outsourcing of TEL services

Lecture Capture: 2018 73%, 2020 82%
Digital Repositories: 2018 71%, 2020 76%
Media Streaming: 2018 62%, 2020 67%
VLE for Blended: 2018 39%, 2020 63%
E-portfolio: 2018 46%, 2020 61%
VLE for Fully Online: 2018 46%, 2020 58%

Outsourcing of TEL services is common, with Lecture capture platforms, e-portfolio, VLE platforms (supporting the delivery of blended learning courses and fully online courses), Digital repositories and Media streaming predominantly outsourced as SaaS. Very few respondents are considering bringing outsourced services back in-house.

[Question 3.7]

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Cloud-based SaaS provision of main VLE

42%

SaaS VLE in 2020

14%

SaaS VLE in 2018

Cloud-based SaaS provision of the main VLE has tripled since the 2018 Survey and is now the most popular hosting model in responding UK HE institutions.
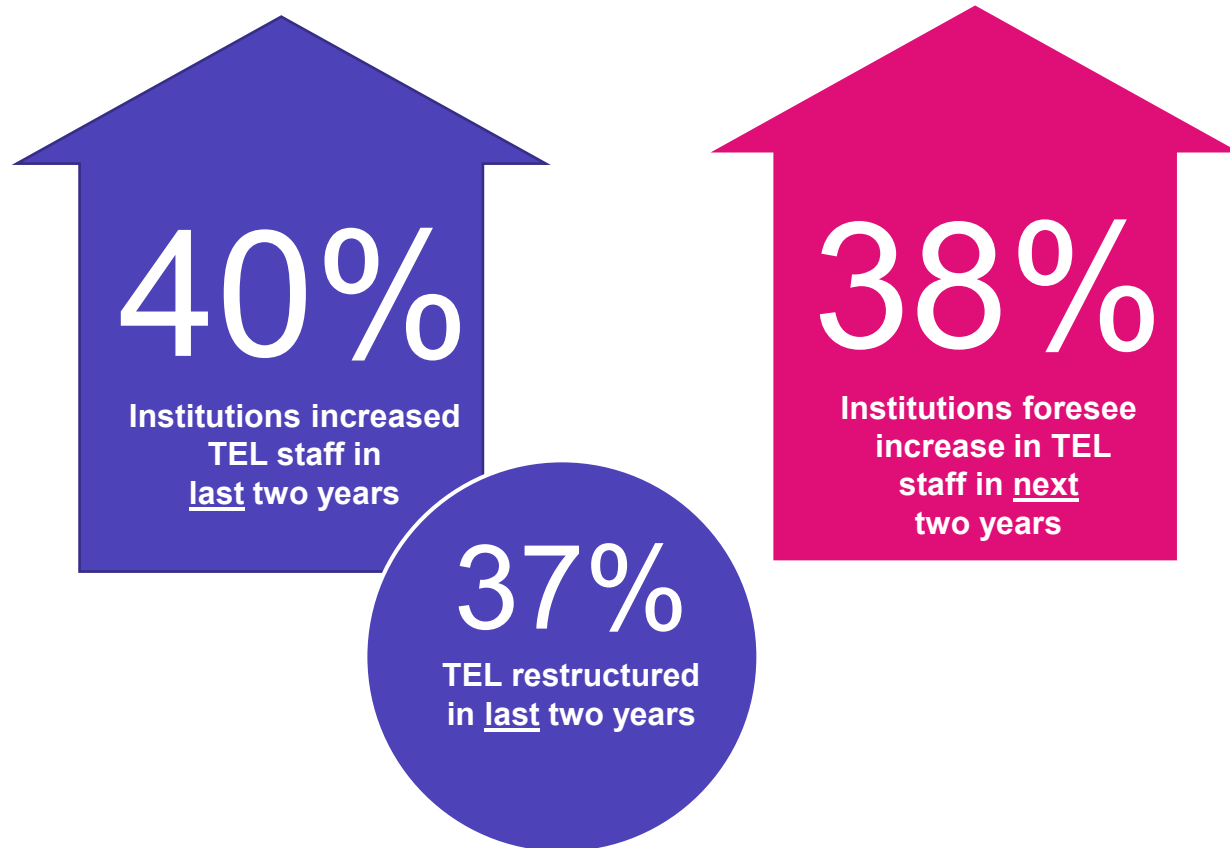
[Question 3.8]

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Supporting Technology Enhanced Learning

3

Units supporting TEL

¾

Have a dedicated TEL support unit

½

Have local TEL support

Institutions continue to provide TEL support via a range of units, with a mean of around three per institution. Almost three-quarters of respondents to the 2020 Survey reported that they have a dedicated TEL support unit. Just under half of institutions reported having local TEL support devolved to a faculty, school or department.
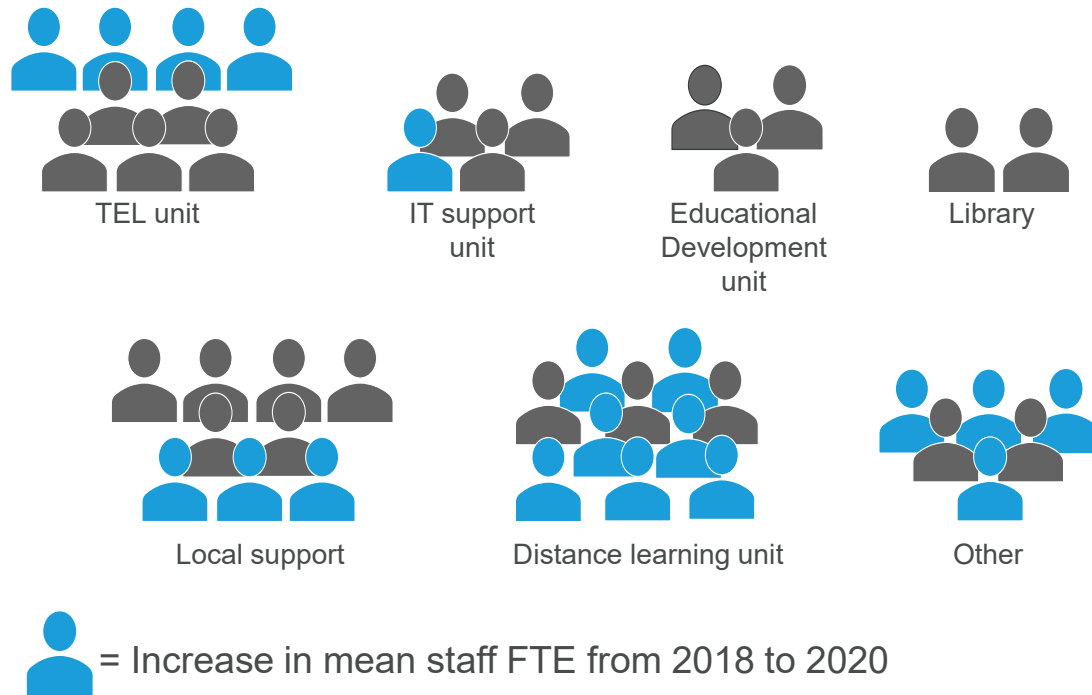
[Question 5.1]

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Staffing levels continue to change

40%
Institutions increased TEL staff in last two years

37%
TEL restructured in last two years

38%
Institutions foresee increase in TEL staff in next two years

Staffing levels continue to change, with 40% of respondents reporting the number of staff supporting TEL had increased since the last Survey, while a restructuring of TEL provision took place in more than one-third of responding institutions over the last two years. Further changes are expected, with more than one-third of respondents foreseeing an increase in the number of staff over the next two years.
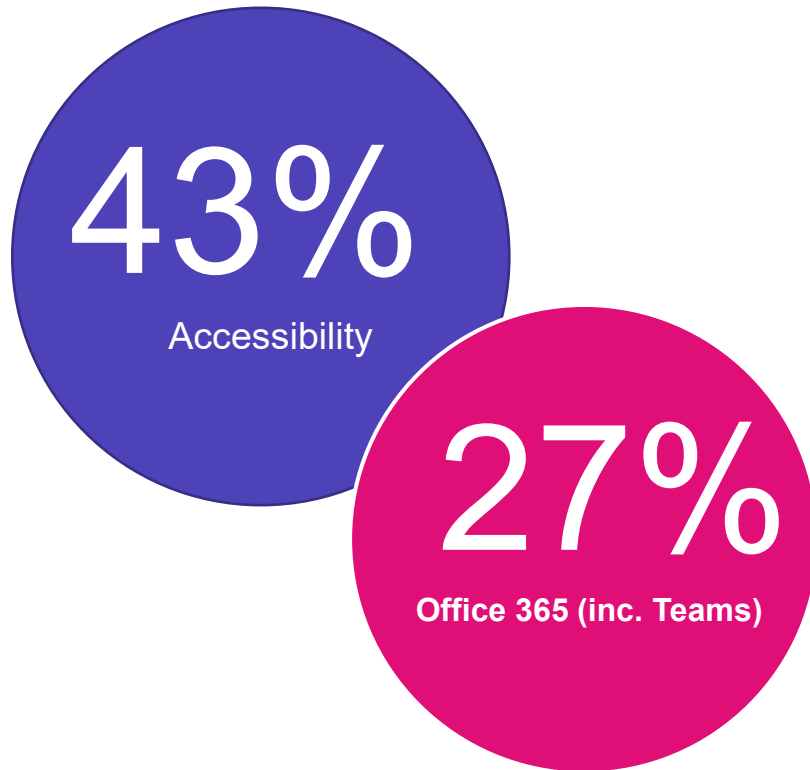
[Questions 5.4, 5.6]

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Locations of TEL support staff

TEL unit

IT support unit

Educational Development unit

Library

Local support

Distance learning unit

Other

= Increase in mean staff FTE from 2018 to 2020

There has been an overall growth in the FTE of TEL staff, with the majority of staff located in TEL units, local support and distance learning units. The biggest increase is in distance learning units, although this is partially attributed to two very large distance learning teams (50+ FTE). Three institutions reported over 100 FTE staff supporting TEL across the institution, however around half of institutions reported 15 or fewer FTE staff.
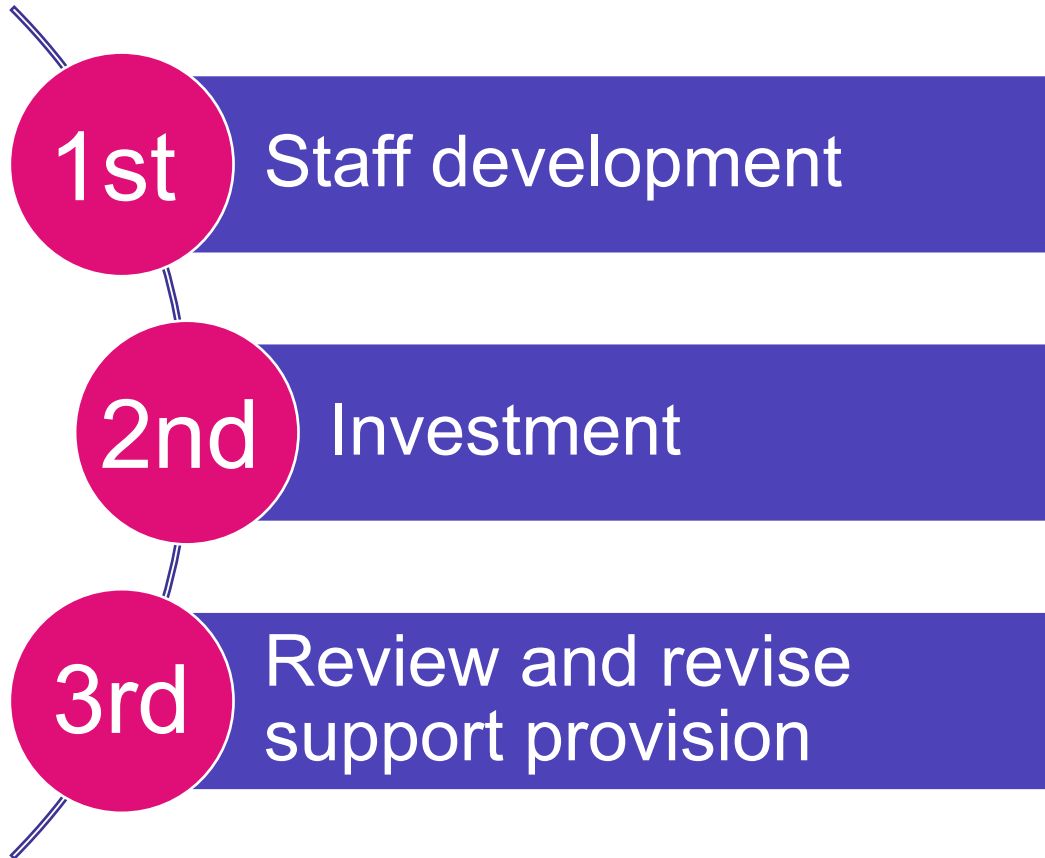
[Question 5.2]

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Developments making new demands on support

43%
Accessibility

27%
Office 365 (inc. Teams)

Reflecting the impact of legislative changes noted in the 2020 Survey, 43% of responding institutions reported that Accessibility was one of the developments making new demands on support. The second highest development was Office365, reported by 27% of respondents.

[Question 6.3]

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Overcoming the challenges to the development of TEL

1st Staff development

2nd Investment

3rd Review and revise support provision

When asked how institutions can best overcome the challenges posed by new developments, the top three responses included provision of staff development opportunities, investment of time, money and resources, and reviewing and revising support provision, such as increasing the support available.

[Question 6.5]

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