

Comparing Global University

Mindsets and Student Expectations:

Closing the Gap to Create the Ideal Learner Experience



The higher education ecosystem has prioritized digital transformation for years, but the pandemic catalyzed and accelerated transformation efforts. In parallel, student expectations have also shifted dramatically, deepening a gap between how universities approach digital learning and what students seek in their individual learner experience. As universities plan ahead to meet the needs of tomorrow's students, this research analyzes key themes identified by students and university leaders across ten different countries about technology, student support, and other critical topics to help inform the direction of global higher education.

Residual Effects of the Pandemic and Impacts on Accessibility

The last two years have been a period unlike any other. The entire world made frequent adjustments as the situation continuously changed to keep day-to-day life moving forward. Higher education was no exception and, in some ways, may have been one of the more impacted industries, given the shift from largely in-person instruction to a completely online experience in a matter of weeks, if not days. Universities made significant progress from the initial “quick pivot” to virtual learning to thinking about how they’ll meet the needs of students long-term, many of whom continue to feel the ripple effects on their education.

In fact, 53% of students globally stated that the pandemic continues to impact their education today - 36% paused their studies or reduced the number of courses taken, while 20% changed their major and 7% changed universities altogether. Furthermore, 69% of students are concerned that the pandemic will impact careers, with 27% feeling that finding a job will generally be more difficult.

While universities also continue to feel the effects of COVID-19, most have returned to an in-person teaching model similar to before the pandemic. However, students and university leaders now see new opportunities to make adjustments to the learning experience and recognize there is still progress to be made, as student expectations and needs do not fully match what university leaders envision for the future of higher education.

Expanding Access and Breaking Down Barriers

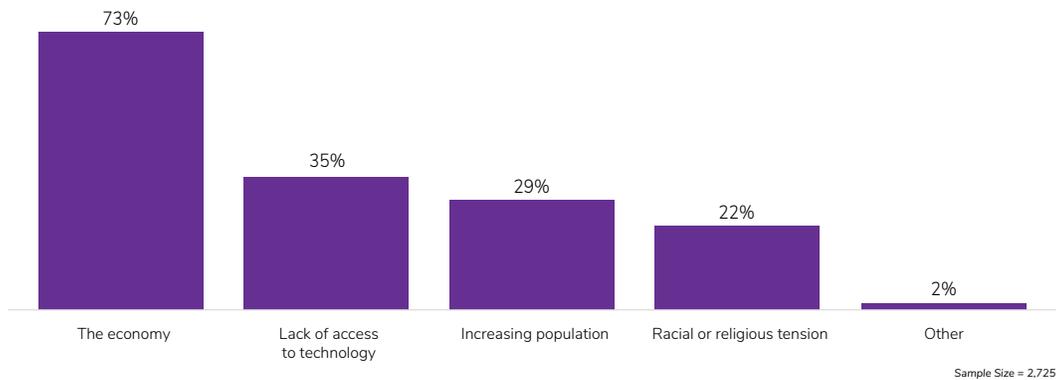
Universities have proven themselves essential to local and national resilience during the pandemic. At the same time, the transition to remote teaching and learning exacerbated obstacles like easy access to the internet and technology for certain student populations.

Financial barriers and the economy are the biggest global challenges impacting equitable access to higher education. When deciding to pursue a higher education degree, paying for their education was considered the number one barrier by 64% of learners, followed by physical barriers like location or transportation (44%) and technology barriers such as lack of Wi-Fi access (32%).

Outside the pandemic, the economy continues to have the biggest impact on learners across all regions (73%), followed by lack of access to technology (35%) and an increasing population (29%). University leaders are in tune with these potential barriers, recognizing the economy (44%) and lack of technology access (33%) as the factors most likely to impact students in their country. To foster more equitable access to higher education, university leaders should continue to seek ways to ensure technology access for all students while also considering all costs associated with a university education.

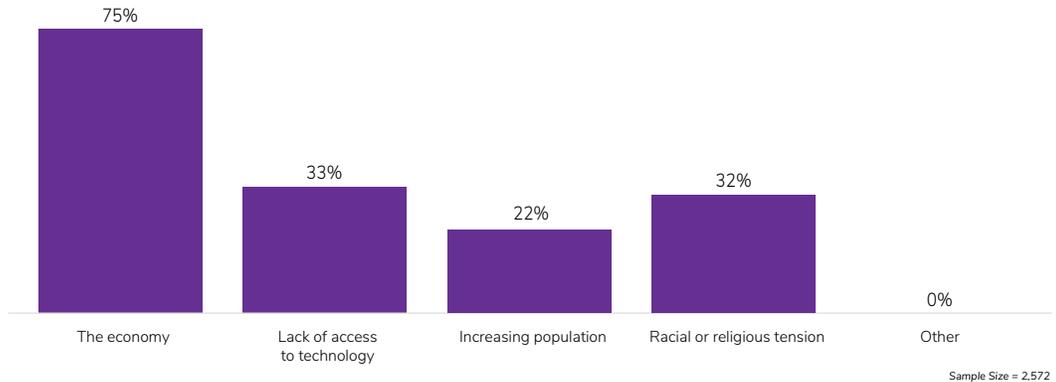
Student Responses

Outside the pandemic, which of the following factors continue to have the biggest impact on students in the country where you study? (Please select all that apply.)



University Leader Responses

Outside the pandemic, which of the following factors continue to have the biggest impact on students in your home country? (Please select all that apply.)



Regional Highlight

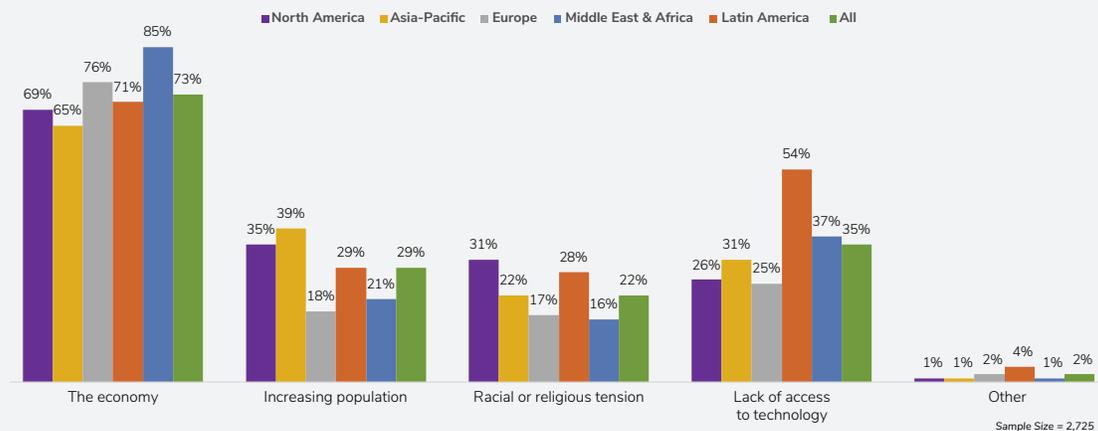


While the high-level view of educational barriers shows similarities globally, insights regarding lack of access to technology have higher variability across regions.

Globally, 35% of students cited lack of access to technology as an external factor that impacts learners in their home country. However, this is significantly higher in the Middle East and Africa, where 54% of students indicated this was a challenge. This factor was also more highly noted in Latin America (37% of students).

Student Responses

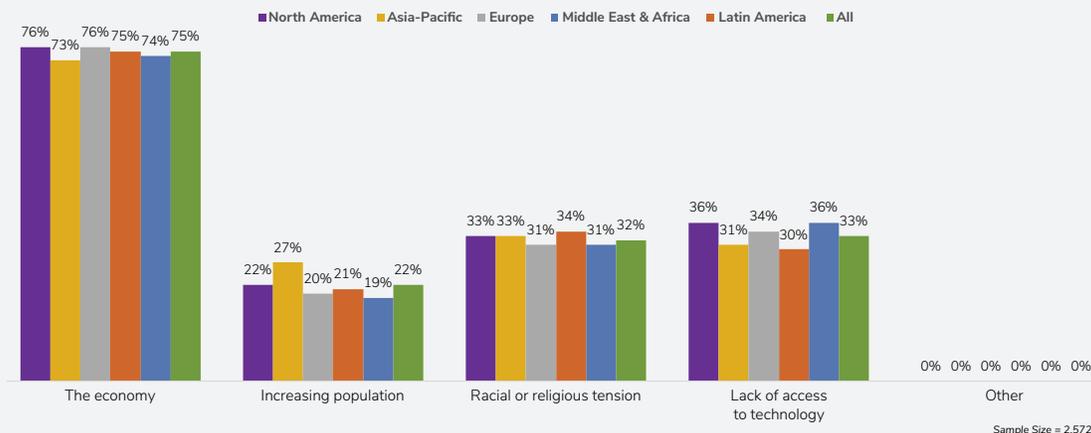
Outside the pandemic, which of the following factors continue to have the biggest impact on students in the country where you study? Please select all that apply. (By region)



University leaders are generally aligned with learners and identify access to technology as a factor that continues to impact students' ability to succeed. The only noted exception is among university leaders in the Middle East and Africa, with only 30% feeling that technology access was a concern compared to 54% of students, indicating a discrepancy between their perception and the student experience.

University Leader Responses

Outside the pandemic, which of the following factors continue to have the biggest impact on students in your home country? Please select all that apply. (By region)



Initiatives at the regional, country, and institutional levels are needed to equip students with technology resources and digital skills that support their success and continue to break down barriers moving forward.

Learning and Support on Tomorrow's Campus

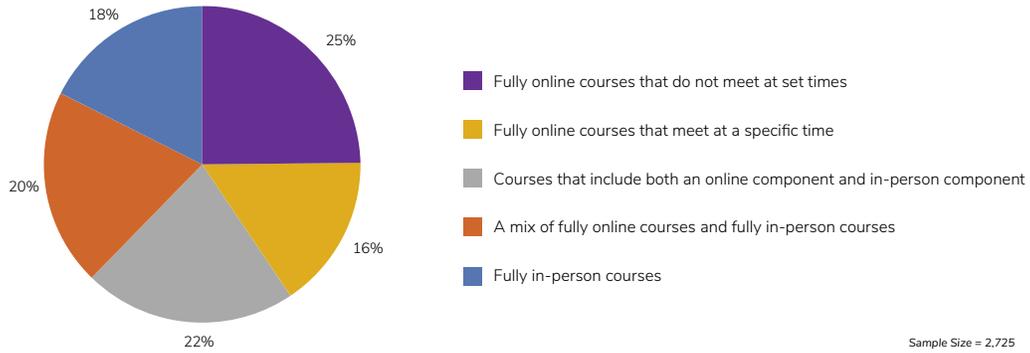
As universities continue to pursue accessibility for all learners, student expectations around everything from course delivery formats to how they receive support and information have shifted, impacted in part by their pandemic experience. And for students who are studying completely online or in a hybrid format, the element of support plays an even more significant role in their academic journey.

Course Structure and Delivery

Students are looking for more options for courses, particularly after experiencing the move online during the pandemic. Of students surveyed globally, 41% indicated a preference for fully online courses conducted either synchronously, that is, meeting at a specified time (16%), or asynchronously, allowing students to complete work when available (25%). Only 18% of students indicated that they prefer fully in-person courses. While there is still a recognized preference for in-person courses by part of the population and a mix of in-person and online coursework for a larger group, over **80% of students now prefer that at least some of their courses or course meetings take place online**. This indicates that students have adjusted to taking courses online and, by and large, prefer online course options.

Student Responses

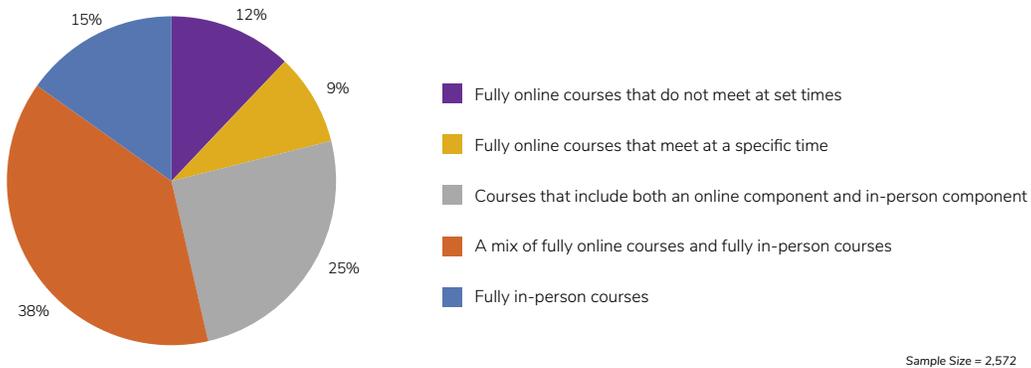
Which type of course delivery method do you prefer?



There is also clearly recognition of the potential for online course delivery among global university leaders. Currently, 30% report that their universities only offer fully in-person courses; however, they expect this percentage to shrink to 18% by 2025, indicating investment in online learning and a transition to a mixed delivery model. While students expressed a strong preference for having all of their courses online, university leaders indicate a higher likelihood of offering a mix of online and in-person courses for the foreseeable future, as 38% indicated this would be the model at their university by 2025, more than doubling compared to current offerings. Although this would not completely align with students' preferences, it is a move in the right direction while still maintaining an in-person experience for those students who prefer it.

University Leader Responses

What do you anticipate instructional delivery will look like at your university in 2025?



As a whole, university leaders are more confident than students that changes in course delivery will occur in the next five years. Responses indicate that 46% of students feel that more courses will be available online, compared to 59% of university leaders. Additionally, 56% of university leaders believe they will have different program options, but only 12% of students felt the same. If university leaders can help ensure that these changes will happen in the next five years, higher education will look different with more course options, more personalized communications, and more interaction between students and professors. This would help bring the higher education experience closer to students' expectations and likely positively impact student sentiment.

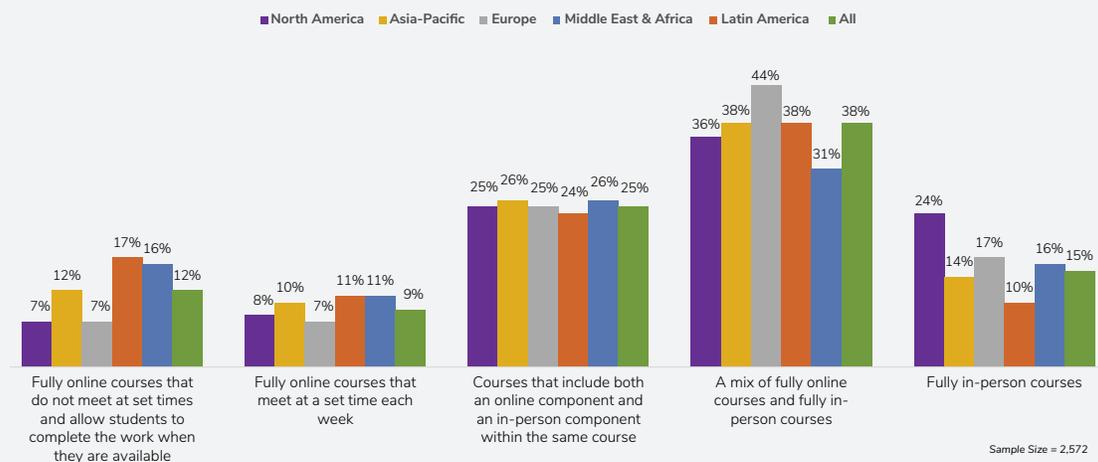
Regional Highlight



North American higher education may have an opportunity to learn from regions around the world concerning course delivery formats. In this survey, 24% of North American leaders state that courses would still only be offered in a fully in-person format by 2025 – a significantly higher percentage than in any other region. By contrast, only 10% of university leaders in the Middle East and Africa indicate the same. In fact, the highest percentage of students interested in fully asynchronous courses are from North America, while the lowest percentage of university leaders indicate that all courses would be offered asynchronously compared to other regions. European university leaders indicate the same percentage as North American leaders, but fewer students in Europe prefer fully asynchronous courses.

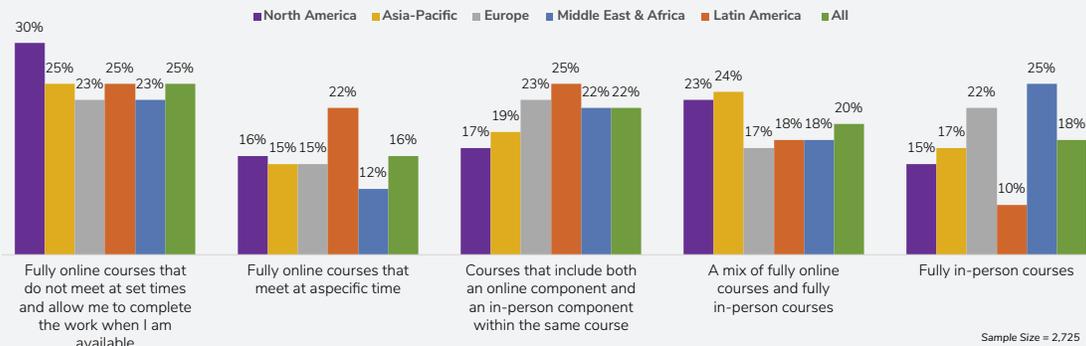
University Leader Responses

What do you anticipate instructional delivery will look like at your university in 2025? (By region)



Student Responses

Which type of course delivery method do you prefer? (By region)



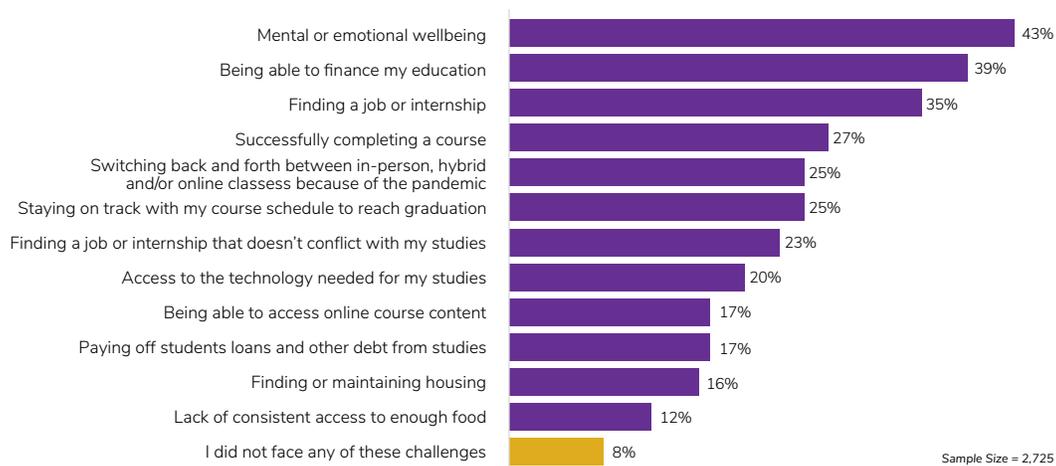
External Challenges and Institutional Support

Outside the classroom, students pursuing higher education continue to face a variety of challenges, many of which vary by country or region and were greatly exacerbated during the pandemic. The gap between student expectations and how leaders feel about meeting student needs represents an opportunity for universities to provide more – and more appropriate – support in the future.

The top three challenges experienced by students in the last year were related to their mental or emotional wellbeing (43%), being able to finance their education (39%), and finding a job or internship (35%). While these have always been concerns for students, the pandemic accelerated the issues and added personal stressors to the mix that influenced students' mental health.

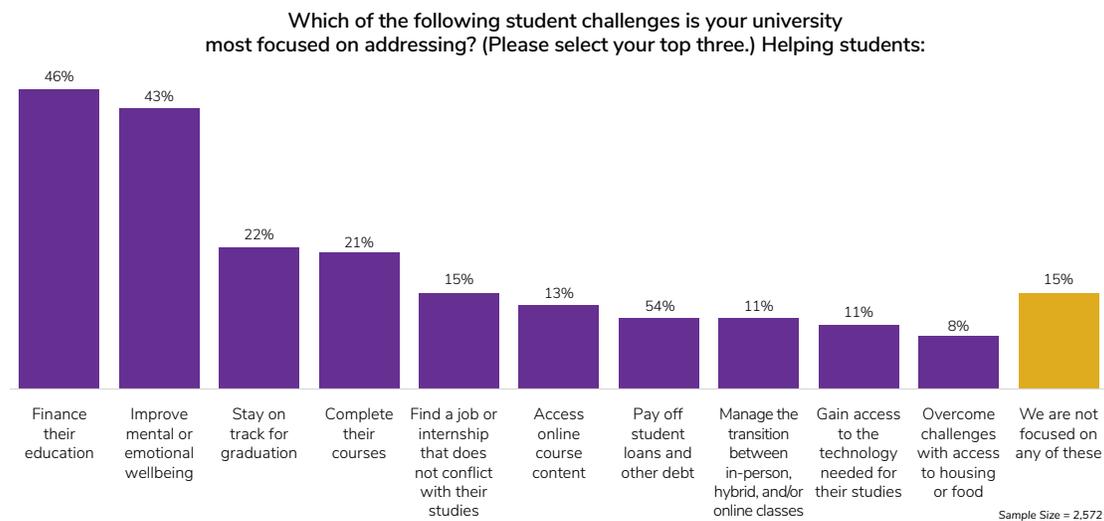
Student Responses

Have you experienced challenges with any of the areas below in the last year?



Leaders were largely aligned with students in terms of the challenges their university is focused on addressing, citing helping learners finance their education (46%) and improving mental or emotional wellbeing (43%) as the top two areas of focus. But only 15% of university leaders are concerned with helping students find jobs or internships, indicating an opportunity for universities to consider expanding resources for support.

University Leader Responses



Overall, 81% of university leaders feel that their institution responded to student challenges fairly or very effectively, while only 67% of students expressed satisfaction with the university’s response to challenges. While both audiences appear to be aligned on what the challenges themselves are, this discrepancy could be attributed to the type of resources and channels that universities are utilizing for support and communication.

Filling the Support Gap

Increasing support for students begins with understanding the level of support that students want. Survey results indicate that 40% of students strongly agree they would like to receive more support from their university to be successful. In comparison, only 22% of university leaders believe that students would like more support. This shows that perhaps today – and tomorrow’s – learners want more support than what universities are currently planning to offer.

Investing in resources to support students in applying for and securing financial support was the number one area universities plan to invest in this year. Responses indicate that 53% of students agree additional resources in this area would help them to better address challenges, showing

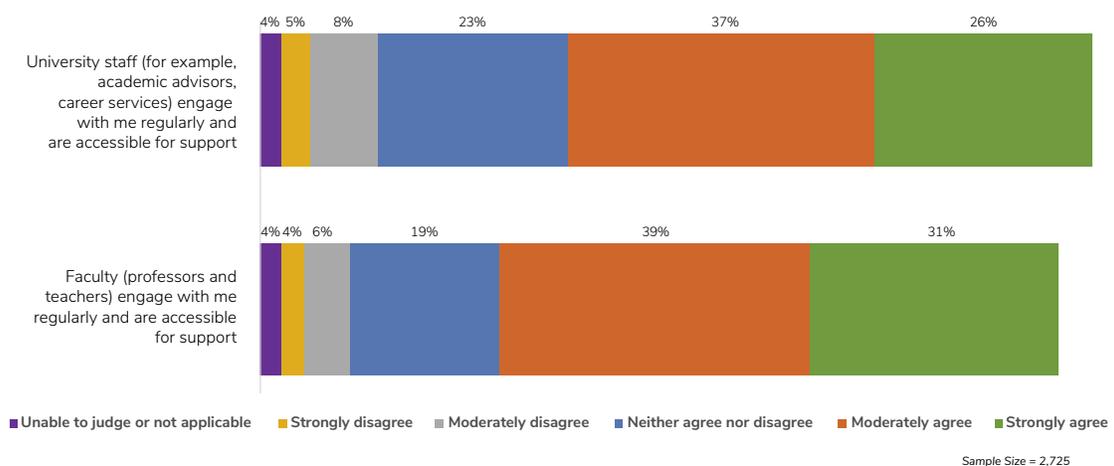
alignment between the two groups. However, most students – 58% – want more career-focused services designed to help them secure a job after graduation, while only 15% of leaders said their university was planning to invest in this area within the following year. Coupled with the knowledge that 69% of students are also concerned that the pandemic will impact their careers, this clearly identifies an area of need and an opportunity for universities globally to help their students transition to the workforce.

Communication & Engagement with Learners

In addition to the support that students receive throughout their university experience, student expectations around communication and engagement have shifted dramatically. In today’s world of real-time, 24/7 access, students expect faster response times to resolve both academic and administrative issues. For example, many learners expect their academic advisor to respond within a few hours, whereas university leaders feel that a same-day response is acceptable. In addition, students indicate that some responses take up to a week or longer, which presents an opportunity to review communication processes.

According to our survey, 70% of leaders agree that staff at their university engage with students on a regular basis and are accessible when they need support, and 66% felt the same way about faculty. In parallel, 63% of students agreed that staff was available to provide support, and 70% agreed that faculty engaged with them on a regular basis, demonstrating that leaders’ perceptions of engagement are a reality that is echoed by their learner population.

Student Responses



University leaders have higher expectations for future communication than students, with 63% anticipating increased interactions with professors and more personalized communications based on specific courses and needs. In comparison, only 42% of students felt that communication would become more personalized, and 37% that they would have more interaction with professors.

When asked about barriers to more frequent communication and engagement with students, university leaders cite a lack of technology as the biggest obstacle to having more contact with students (72%), followed by limited staff and the student-faculty ratio as other key factors.

Investing in Technology

Survey results show that learners globally want – and expect – technology to be more prevalent in their higher education experience. As highlighted above, university leaders are keenly aware of opportunities to adjust course delivery and enhance technology. In fact, 60% believe their institution lacks some of the appropriate digital learning tools to help learners succeed. Perhaps more importantly, 17% of global leaders believe that the technology resources provided by their university do not match up with learner needs in a way that adequately supports their studies.

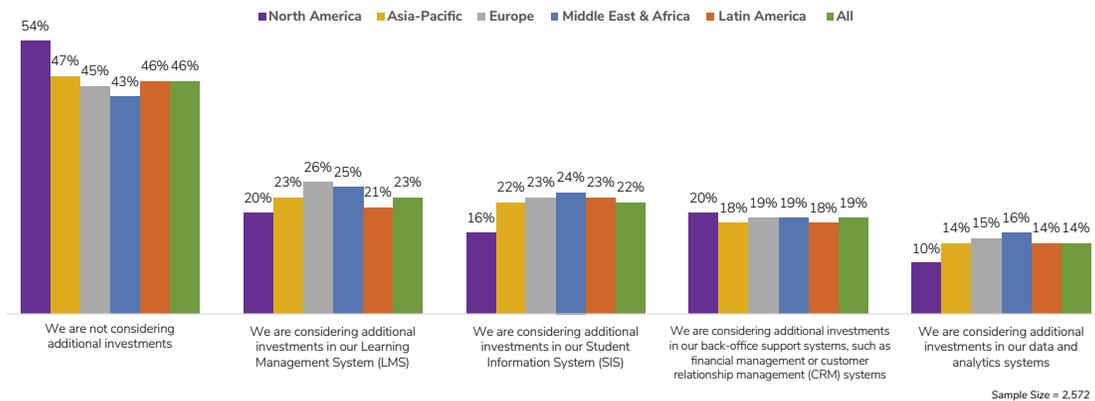
Despite this sentiment, only 26% of university leaders have significantly increased the number of digital learning tools utilized over the past two years. Additionally, 45% have maintained the same technology but significantly changed the way administrators, faculty, and students rely on digital resources, likely due to shifts associated with the pandemic. Results do indicate that universities are focused on continuing to evolve to meet learner needs through technology, even if they have been unable to invest in new resources.

The good news is that universities are on the right track according to learners' expectations of how technology is incorporated into their experience. For example, 73% of students globally prefer to submit assignments in an online portal, and 70% indicate they often or always submit assignments this way. 70% of students also prefer to receive instructor feedback on assignments through an online platform, and 66% of students indicate they often or always receive feedback this way.

As universities continue on the path to fully supporting learners, more investment in technology is necessary. University leaders are cognizant of this need, and more than half are considering additional investments in technologies, such as learning management systems (LMS), student information systems (SIS), and back-office support systems like financial management and customer relationship management (CRM).

University Leader Responses

Is your university considering additional investments in the following technologies to better support students in the future? Please select all that apply. (By region)



Personalized and Data-Driven Experiences

Investing in or updating educational technologies such as a learning management system or a student information system allows universities to personalize the learner experience and improve support for faculty members and staff by creating more meaningful opportunities and interactions through data. According to our survey, 66% of learners agree that their university views them as individuals with unique needs and preferences, but most learners express a desire for even greater personalization. For example, 70% would like to receive more reminders of deadlines and other key information, such as a notification about an outstanding bill or when to register for classes, as they would be more likely to complete the task on time or if prompted. And 71% would like to receive recommendations about which courses to take and when to do so during their academic career.

In comparison, 95% of leaders believe their university views all learners as individuals with unique needs and preferences, which is significantly higher than the learner response. Therefore, there is continued opportunity for universities to provide more personalized, data-driven experiences by investing in technology.

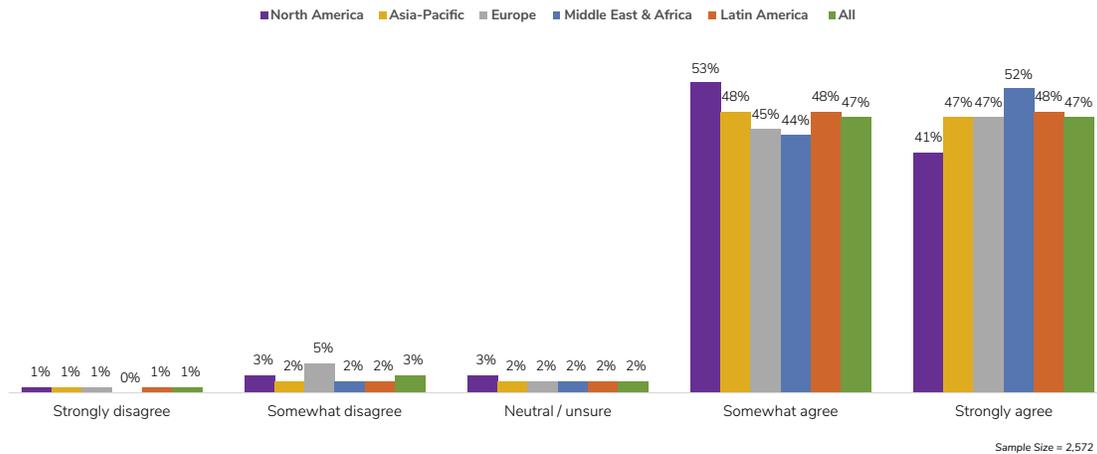
Leaders are nearly unanimous on the value of this opportunity. Specifically, 94% agree that a holistic view of a learner's data pulled across multiple systems would benefit their team and that more personalized experiences would help more learners at their university achieve their goals. In addition, the same percentage of leaders indicate that their university is actively looking for new opportunities to aggregate and analyze learner data to drive more insights.

A holistic technology strategy underpinned by data creates a 360-degree view of individual learners that enables early identification of specific needs for student support, such as assistance with meeting course

expectations, referral for counseling or mental health services, medical attention, or financial support. This approach also enables better outcomes for students as faculty, staff, and university leaders have a better understanding of the right action to take at the right time when referencing a cohesive picture of who a student is – far beyond just their program of study or general demographic information.

University Leader Responses

As we consider student needs for the future, our university is actively looking for new opportunities to aggregate and analyze student data to give us more insights. (By region)



Final Thoughts

Higher education is continuing to undergo a rapid transformation due to the pandemic. Progress has been made in creating an experience that better meets student expectations; however, there remains much opportunity to enable better support of learners to improve access, retention, and student success globally. By considering student feedback and investing in technology resources to deliver more personalization across everything from course delivery options to career services, higher education leaders can position their university to provide an experience that meets the needs of today’s learners – and those of tomorrow.

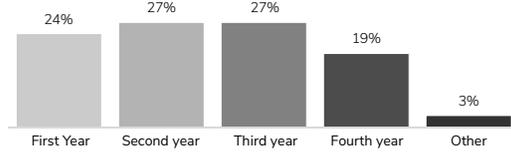
Respondent Profiles

Student Survey

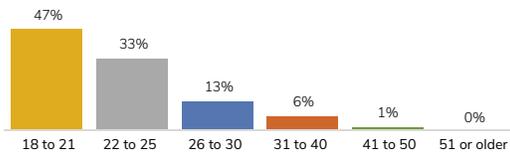
2,725
TOTAL RESPONDENTS

Students at a public or private university pursuing a degree

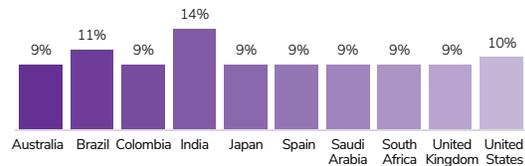
Students by year in school



Students by age



Students by country

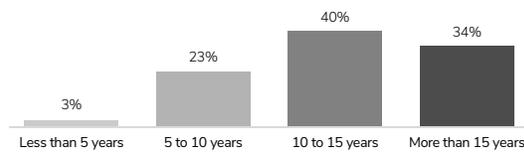


Leader Survey

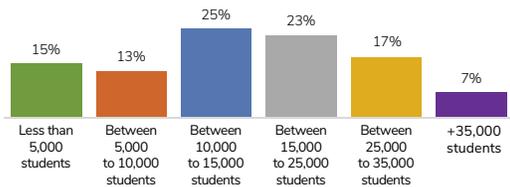
2,572
TOTAL RESPONDENTS

Senior leaders at a public or private university

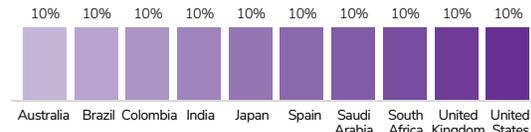
Leaders by years at university



Leaders by university size



Leaders by country



Methodology

Data collection was conducted online among university leaders and students across ten countries in March and April 2022, including Australia, Brazil, Colombia, India, Japan, Spain, Saudi Arabia, South Africa, the United Kingdom, and the United States. Separate questionnaires with similar questions

for students and leaders were utilized to enable comparisons. To qualify, student respondents had to indicate that they were currently enrolled at a higher education institution and pursuing a degree or diploma. University leader respondents had to indicate that they were currently senior leaders (dean, provost, rector, etc.) at a higher education institution. In total, 2,572 university leaders and 2,725 students qualified for and completed the survey. When referring to percentages throughout the analysis, null responses were excluded.

About Anthology

Anthology offers the largest EdTech ecosystem on a global scale, supporting over 150 million users in 80 countries. The company's mission is to provide dynamic, data-informed experiences to the global education community so that learners and educators can achieve their goals.

Through over 60 SaaS products and services, Anthology advances learning in partnership with K-12, higher education, business and government institutions. Tapping into this unmatched portfolio of solutions, only Anthology can leverage data from across the EdTech ecosystem to create intelligent experiences that lead to better outcomes.

Learn more about our mission at www.anthology.com.

About the Authors

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Darcy W. Hardy, Ph.D., is associate vice-president for academic affairs (North America) and director of the Center for Advancing Learning at Anthology. Hardy is an award-winning distance and online learning professional with experience as a higher education administrator, a board member in state and national associations, and a contributor in higher education EdTech. Prior to joining Anthology, she spent more than 30 years in public higher education, including The University of Texas System and Texas State University-San Marcos. During her tenure with The University of Texas at San Antonio, she worked with the Obama Administration, completing a three-year Intergovernmental Personnel Act appointment at the

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Joel Armando, Ph.D., is the product manager director for Anthology's Educational Services. She has over 20 years of experience in higher education, fulfilling different roles: leadership, curriculum and learning design, research, and teaching. Prior to Anthology, Armando led the educational technology department at Universidad Nacional de Córdoba (Argentina), was the learning innovation manager at London Business School (UK), and was an educational technologist at Cass Business School (UK). Armando holds a Ph.D. in design and innovation in education (USC, Spain), a PGDip in learning technologies (UCL, UK), an MSc in educational research, and a BSc in education (UNC, Argentina).

Adriana Botha, Ph.D., is an educational psychologist by profession and joined the higher education landscape in 2009 as a project manager and deputy-director for improving graduate throughput at the Sefako Makgatho Health Sciences University (South Africa). Her journey continued to the University of Pretoria (UP) in 2014-2015 as an instructional designer. Since 2016, she has worked as an education consultant for UP, assigned to the faculty of engineering, built-environment, and IT. Her career reached an exciting peak after completing her Ph.D. in information systems (2020) in the department for informatics (UP). Botha joined Blackboard (now part of Anthology) in July 2021 as a contractor in the role of senior educational consultant and is responsible for delivering services primarily in the EMEA region. Her portfolio revolves around digital teaching and learning training, assessment & accreditation services, learning technology planning services, and product training.

Rob Robinson, Ph.D., is a senior director for strategic initiatives at Anthology. In this role, Robinson works directly with colleges and universities on strategic issues. In addition, he is the associate director of Anthology's Center for Advancing Learning, a policy, analysis, and corporate social responsibility hub. From 2012 to 2021, he was senior principal strategy consultant at Civitas Learning, where he worked with colleges and universities to help them leverage data analytics to further their mission of student success, with a specific focus on change management and institutional culture. Robinson also has 27 years of experience in public higher education in The University of Texas System across a variety of roles and institutions.

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