

s a n o m a get the world

A close-up photograph of two young women with blonde hair looking intently at a tablet computer. The woman on the left is wearing a black and white patterned top, and the woman on the right is wearing a dark top. The background is blurred. There are three white square graphic elements: one on the left side, one on the right side, and one in the bottom right corner.

# Unlocking the potential of digital learning

a Sanoma white paper



# Unlocking the potential of digital learning

European education is on the brink of a major transformation, as schools are beginning to embrace digital learning. A study among European teachers and headmasters shows they feel digital learning will greatly increase student motivation, learning outcomes and teacher efficiency. However, they also feel frustrated that the right conditions for a faster and fuller adoption of digital learning are lacking. This white paper gives food for thought to the key players in European education, by clarifying how digital learning can be accelerated.

## A short history of education

Education has been central to the development of Europe into a culturally and economically prosperous continent. The first few schools emerged in ancient Greece and Rome, but it wasn't until the Middle Ages that the Catholic Church developed a rudimentary formal system of schools and universities.

Over time, this transformed into a broader and state-sponsored system of public primary schools, which meant education became more widespread.

By the late 19th century most Europeans received elementary training in reading, writing and math and in the 20th century Europe saw the gradual rise of secondary education. Today, primary and secondary education is a basic human right for children across Europe.

Learning technology has changed significantly over time. Initially, knowledge was transferred verbally, but the invention of book printing in the 15th century meant textbooks became widely available. Single educational books evolved into broader educational methods, which were developed by professional educational companies that began to emerge in the 20th century.

Now, most educational materials are developed by the private sector, often in co-operation with author teams of experienced teachers. As a result, modern educational materials are an essential tool for teachers to deliver the outcomes society wants.

# The rise of digital technology and education

Six hundred years after Gutenberg printed his first works, digital technology is transforming our world. Smartphones, tablets, apps and social media, for example, are increasingly central to our work and social life. Digital technology continues to evolve at a breakneck pace, with cloud computing, the Internet of things, smart watches, Google Glass and virtual reality goggles as recent developments. While children have been particularly fast to embrace these changes, using technology for study or business purposes requires IT skills to be properly taught.

These changes are also having an impact on schools. Computers and digital whiteboards are relatively common in the classroom, students routinely use the Internet as a source of information and several educational publishers have begun to develop digital materials. The most adventurous of schools have abandoned books in favour of iPads, but teaching and learning materials remain essentially analogue.

Nevertheless, an ecosystem is emerging around digital learning. This includes educational publishers like Pearson, Macmillan and Sanoma Learning, but also digital start-ups that provide educational software. Other parties are providers of virtual learning environments such as Moodle and Frog and, mostly local, providers of management software for the schools. Software companies like Google and Microsoft and hardware companies like Apple and Samsung have a strong presence in schools too.

Governments - national, regional and local - are another key player as they determine educational policies and budgets. While individual schools may receive financing to implement new equipment, a broader strategy to put digital technology at the heart of modern education is lacking. Teacher training is similarly in need of an overhaul, so that teachers can adapt and teach 21st century skills.

## 1,980 Participants

Teachers & headmasters of primary & secondary schools



Sweden  
**565**



Netherlands  
**387**



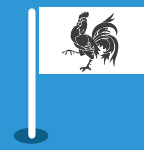
Finland  
**316**



Poland  
**277**



Flanders  
**242**



Wallonia  
**193**

## Enthusiastic and confident

Digital learning is still in its infancy and the potential is there for it to revolutionise education. But what is needed to achieve that? And who should take the lead? To get more clarity, Sanoma Learning, the leading European provider of learning solutions polled 1,980 teachers and headmasters from Finland, Sweden, Poland, the Netherlands and Belgium.

Their answers shed a fascinating light on the current state and the future of digital learning. Crucially, teachers and headmasters are very eager to embrace digital learning. Some 83% say it will make students more interested and motivated, while two-thirds expect significant increases in workflow efficiency and learning outcomes. This means students learn more and do better on tests, and teachers save time and effort on preparing, teaching and administration.

In spite of this clear vote of confidence for digital learning, there are some local differences. Expectations about the learning outcome are highest in Finland, but teachers in the Dutch-speaking region of Belgium, are the most sceptical, also about increases in workflow

efficiency. When it comes to student engagement, Finland and the French-speaking region of Belgium are the most enthusiastic.

Teachers and headmasters are also clear about who or what helps them to improve learning outcomes and student engagement. Overall, they said that educational publishers, online materials and virtual environments are most important, followed by global software companies. In terms of improvements in workflow efficiency, teachers and headmasters ranked educational publishers, free online materials and providers of school management systems as the highest, followed by online learning environments and software companies.

# Teachers and headmasters are very eager to embrace digital learning



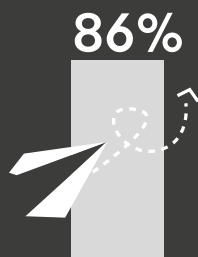
## Ready and willing

So the vast majority believe in the potential of digital learning, but we also wanted to see whether teachers and headmasters felt ready and willing to use digital learning. Here, too, our research paints a positive picture: 86% of teachers and headmasters say they are quite motivated to use digital learning and 70% feel confident about it. In Finland, the Dutch-speaking region of Belgium and the Netherlands, they are most motivated and confident, in Sweden the least.

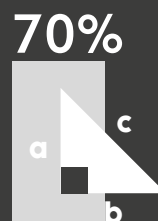
We also found that teachers and headmasters have a sense of mission and responsibility about them when it comes to embracing digital learning. Some 85% believe that they are crucial to leading the change towards digital learning, while only 6% think this is not the case. The believers are almost completely dominant in Finland (98%) and in Sweden (90%), while in Poland some 19% of teachers think they are not crucial at all.



**TEACHERS ARE..**



Motivated



Confident



Crucial in leading  
the change towards  
digital learning

# Yet unprepared and unequipped

Teachers and headmasters feel highly motivated and enthusiastic about digital learning, and yet digital learning seems slow to take off in Europe. Our research found some important clues as to what is preventing schools from moving a lot faster. Simply put: teachers and headmasters feel unprepared and unequipped to deliver digital learning solutions.

In fact, most schools lack sufficient material like hardware (58%) and digital whiteboards and other teaching equipment (54%), while half of the schools lack sufficient budget or a clear plan to implement digital learning. Quite a number of schools lack sufficient Internet speeds (34%), well-trained staff (39%) and/or tech-savvy students (22%).

Having said that, Polish teachers think it is best prepared for digital learning. They are most likely to have a clear implementation plan, well-trained/skilled teachers and tech savvy-students, although they lack sufficient budget and material. Teachers and headmasters from the Dutch-speaking region of Belgium have sufficient digital whiteboards and other teaching equipment, but their colleagues in the French-speaking region lack sufficient material, budget, infrastructure and skills.

## Differences between countries



From their central position within the school system, teachers and headmasters have a clear view about what is needed to accelerate digital learning. They believe that training in digital learning is most important, followed by implementation plans and increased budget for digital learning. Relevant but less crucial is the purchase of digital whiteboards, teaching equipment and hardware for students. They attached least importance to the training of students, increased Internet speeds and allowing students to bring their own hardware.

Again, there are some local differences. In Poland teachers think it is more important to increase budget for digital learning in order to accelerate digital learning in their school. In the Netherlands teachers give priority to creating or improving digital learning implementation plans. And In Finland teachers emphasise the need to train teachers and staff.



# What do we need?



A clear plan



Budget



Equipment



Training

# Why do we need it?



83%

Student engagement



64%

Student learning outcomes



66%

School & teacher workflow efficiency

# Who do we need?

1

Educational publishers



2

Free online learning materials



3

Providers of school management systems



# Closing the gap

Digital technology holds the promise of a genuine revolution in education. Teachers and headmasters believe in it, feel motivated and confident and know the right materials are being developed. Schools, however, feel they are not prepared to adopt digital learning and in light of the speed at which digital technology evolves, the gap between what schools can offer and what children need is widening. Unless changes are made quickly, schools may be unable to close the gap and fail to provide children with the education they need.

Essentially what is needed, is for the right conditions to be created for schools to adopt digital learning, specifically through:

- Training of teachers
- Development of digital implementation plans
- Increased budget for digital learning
- Purchase of more digital teaching materials and hardware

Schools are looking to governments to create those conditions, for example by having clear policies, revamping the teacher training curriculum and setting clear IT standards. Schools also feel that educational publishers like Sanoma Learning are their main partners on this journey. In general, it's important for all stakeholders to work together through coalitions and partnerships.

The digital transformation will not be easy, but it will be worthwhile. Digital learning will prepare generations of children for a world that will be fundamentally digital. And it promises to empower schools to work more cost-efficiently and effectively, meaning society sees a better return on the public money spent. Like the previous education revolutions, the effect of this one may be felt for centuries to come.



## About the survey

Online research firm MWM2 conducted the survey in May 2014 as part of the new Sanoma Learning Panel. It was aimed at teachers and headmasters at primary and secondary schools, and conducted across six regions/countries: Finland, Sweden, Poland, the Netherlands, and Belgium (Flanders and Wallonia).

## About the methodology

The survey was done via an online survey methodology known as Computer Assisted Web Interviewing. Out of a total of 1,980 respondents, 565 were from Sweden (29%), 387 from the Netherlands (20%), 316 from Finland (16%), 277 from Poland (14%), 242 from Flanders, the Dutch-speaking region of Belgium (12%), and 193 from Wallonia, the French-speaking region of Belgium (10%). The total sample size is large enough to make reliable statements.

## About Sanoma Learning

Sanoma Learning is one of Europe's leading publishers of educational material for primary, secondary and vocational education. Our mission is to support teachers and pupils to achieve excellent learning outcomes, enhance workflow efficiency and support engaging learning. We believe that excellent teachers, motivated pupils and high-quality integrated learning solutions are cornerstones of excellent education. More information: [www.sanomalearning.com](http://www.sanomalearning.com).

## About MWM2

MWM2 is a leading Dutch research agency located in Amsterdam, specialised in online research and data collection. MWM2 believes in the power of stakeholder opinion for all organisations. MWM2 advises and assists organisations with listening to their stakeholders and provides support when translating stakeholder opinions into organisational actions.

More information: [www.mwm2.nl](http://www.mwm2.nl)



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