
EDUCATION: THE JOURNEY TOWARDS A DIGITAL REVOLUTION

Drawing on insights and research
from around the world

The report in numbers

1.7 billion

students were affected worldwide

190

countries were forced to close their educational institutions

45%

of learners have been accessing digital learning on a mobile phone

86%

of teachers in the UK specified that their workload had increased since the implementation of remote education

98%

expect digital learning to continue to be embedded in education in the future

52%

of higher education students said their learning was impacted by slow or unreliable internet connection

75%

of learners have used educational TV for home-learning, while 57% have used radio

78%

believe socio-economic barriers have had a negative impact on the effectiveness of digital learning

94%

of teachers said they had found it challenging to support pupils' vocabulary development while teaching remotely

REPORT CONTENTS

Foreword	02
Education: the journey towards a digital revolution	
Section 1	06
Unexpected change	
Section 2	14
A year of disruption: the impacts of the sudden shift to digital learning	
Section 3	26
Spotlighting markets	
Section 4	28
What conclusions have been drawn so far?	
Recommendations	36
Methodology	38

FOREWORD NIGEL PORTWOOD

It is hard to believe that more than a year has now passed since the Covid-19 pandemic spread across the world, impacting almost every aspect of our daily lives. Everyone, whatever their situation or personal circumstances, will have been affected. We have all had to adapt to try and make sense of the world around us, while facing extreme uncertainty.

Education is one of the sectors that has been most dramatically affected by the pandemic. Millions of young people all over the world, along with their teachers and parents, had to suddenly adapt to new ways of learning and accessing educational resources. This shift—which in some cases, happened overnight—really brought to the fore the significant value that educational institutions play in wider society, and to our ways of living. Parents and carers—especially those who work—perhaps felt the closure of institutions more acutely than most, as many were suddenly responsible for managing their children’s learning alongside juggling work and home pressures.

At Oxford University Press (OUP), our global presence meant that we saw first-hand the impact and disruption of school and university closures; we experienced the concerns and frustrations of teachers and professors; and we looked for opportunities to provide support, whether that was through access to free resources, professional development, or by sharing guidance on home learning. We also experienced the sudden shift towards digital.

As an organization, we were already on the path towards digital transformation, and this had to accelerate as demand increased for digital products and services.

Now, more than a year into the pandemic, it is a good time to reflect on what we’ve learned and to start to think about what the future could hold for education. That’s why we have compiled this report. Drawing on insights from 47 of our internal experts across 7 countries—the UK, India, Pakistan, Spain, Turkey, Brazil, and South Africa—as well as from the teachers we work with, and existing secondary research, we’ve explored the short and long-term impact of the shift to digital learning. We’ve considered where it has and hasn’t worked; its effects on learners and teachers both at home and in the classroom; and the repercussions that will continue to shape and define education in the future.

It’s clear from our research that confidence in digital learning has grown and the potential of technology has been realized. As our digital infrastructure continues to develop around the world, it is highly likely that a blended approach, bringing together traditional teaching and learning methods with digital resources, will be embedded within education in the future.

However, this is only the start of a journey; while we can—and should—embrace digital, in-person teaching is of course, still hugely valuable. Equally there are still several knock-on effects caused by the pandemic that need to be addressed, such as concerns around pupil motivation, and the wellbeing of teachers, learners, and parents alike.



Nigel Portwood
CEO, OUP

As we start to look ahead to the future and the 'new normal', we make several recommendations for those working in education, and those responsible for education policy, to take on board.

01

Governments should actively collaborate and learn from teachers and students and use their recent experiences to inform future policy and curriculum development.

02

Governments need to work with institutions to address the digital learning divide, not just now, but for the future too.

03

Wellbeing must be considered as part of education policy—including support for teachers and parents.

04

Curricula should evolve to provide learners with the skills they need to be both digitally fluent, and adaptable to whatever the future holds.

05

We must not assume a 'one size fits all' approach when it comes to digital learning and must consider individual circumstances.

06

Teachers must be brought along the digital journey and supported via professional development.

07

As institutions start to return to the classroom, they will need to develop strategies to support re-integration and learner motivation.

08

Quality content and learning outcomes must be put back at the heart of learning, rather than focusing on learning platforms and methods of delivery.

We have a unique and exciting opportunity as an education community to shape how and what people learn so that it works for modern society and, more importantly, so that it helps young people everywhere to thrive and succeed. Our world has changed so much in the past year, and this change is only going to continue. Let's embrace it, and learn from and support one another, so that together we can reimagine education for the future.



‘The whole country adapted to a nearly four-month national lockdown where most if not all education was carried out online.’

Representative from OUP Spain

01 UNEXPECTED CHANGE

THE BIG PICTURE

1.7 billion

students were affected worldwide

When the first schools shut in China in February 2020, it seemed inconceivable that little over a month later almost all countries would have enacted partial or full closures of schools, universities and other educational establishments. Now, over the course of one year, 190 countries have – at some point – been forced to shut the doors of their educational institutions, affecting more than 1.7 billion students worldwide.¹

190

countries were forced to close their educational institutions

In many cases, this was not limited to one shutdown. In OUP’s seven spotlight markets, all those surveyed endured at least one closure, with nearly half (45 per cent) experiencing multiple national closures lasting more than four consecutive weeks, and a quarter (26 per cent) also experiencing regional closures lasting more than four weeks.

Across the board, from primary schools to universities, on every continent, educators and learners have had to adapt to new models of teaching that have thrown up challenges and opportunities in abundance.

In this section we consider what happened – and the immediate consequences.



Unsurprisingly, tools such as Zoom, Google Classroom and Meet Online have been crucial to supporting learning throughout the pandemic, both for students and teachers.

1.1

A shift in paradigm

As it became apparent that school closures would become a regular feature of 2020, remote learning took off. Unsurprisingly, most countries experienced teething problems. In France, one report suggested between five and eight per cent of students could not be reached by their teachers two weeks after schools shut;² while around 13 per cent of high school students in Los Angeles, the US’s second-largest school district, had no contact with teaching staff three weeks following lockdown.³

For many, remote meant digital. Countries like Estonia were praised for excelling in the transition to digital learning, in part thanks to the ‘early adoption of education technology.’⁴ But generally, this was new territory. According to the World Bank, before Covid-19, no country had a universal digital curriculum for teaching and learning.⁵ It was not a new concept for educators; more than a quarter (26 per cent) of those OUP surveyed

said digital technology was used pre-pandemic to some extent in every educational setting, while 62 per cent said it was used in some educational settings. However, its prevalence undoubtedly increased almost overnight.

By February 2021, among those we asked, almost four in 10 (36 per cent) reported that digital platforms or learning technologies were the primary platforms for delivering education, while the majority (53 per cent) had moved to a split between digital and more traditional methods, like in person learning or print resources. Equally, there was increased recognition of the importance and opportunity of utilizing digital platforms; for example, one respondent from India highlighted the government’s emphasis on ICT and the use of online education in the revised New Education Policy 2020. The Policy, which was revised for the first time in 34 years in July 2020, has seen the creation of a dedicated unit to build the digital infrastructure, content, and capacity needed to support online learning.

13%

of high school students in Los Angeles had no contact with teachers three weeks into lockdown

36%

of educational institutions had digital learning platforms in place by February 2021

1. <https://www.worldbank.org/en/topic/edutech/brief/lessons-for-education-during-covid-19-crisis>
2. LesEchos (2020), Coronavirus: Entre 5 et 8 % des élèves » sans continuité pédagogique depuis la fermeture des écoles
3. The New York Times (2020), As School Moves Online, Many Students Stay Logged Out
4. <https://www.theguardian.com/world/2020/oct/30/lessons-from-estonia-why-excel-digital-learning-during-covid>
5. <https://www.europeandataportal.eu/en/impact-studies/covid-19/education-during-covid-19-moving-towards-e-learning>



45%
of learners have
been accessing digital
learning on a mobile
phone

1.2

Alternative platforms

OUP's research shows that most learners have been accessing digital learning resources on a computer or tablet, or via a combination of computer, tablet, or mobile phone. One in 10 (9 per cent) believe that mobiles have been the primary route for accessing learning.

75%

of learners have used educational TV for home-learning, while 57% have used radio

1.3.1

Divides between countries

UNESCO found that in high-income countries digital learning offerings covered over 80 per cent of the population, but less than 50 per cent in low-income countries due to both technical barriers, such as insufficient access to electricity, and human barriers such as limited digital literacy. Even technologies like TV and radio were rarely inclusive or equitable due to access issues.⁸

This was substantiated by OUP's research. In India, respondents explained that a 'large majority of students have been impacted due to a lack of devices or connectivity at home.' One South African respondent remarked that 'data is costly, and for many families, the only device available is a mobile phone.' They said that only about 10 per cent of learners have access to digital technology at home and this made digital learning 'impossible' for most learners and teachers.

Almost one in 10 (9 per cent) survey respondents also highlighted that their primary platform for teaching came via an alternate solution, tallying with a UNICEF study finding that 75 per cent of countries have used educational TV for at-home learning, while 57 per cent have used radio.⁶

In Pakistan, while private schools moved towards digital learning, the government started a TV and radio channel for state education. Turkey's Ministry of National Education used an 'Education Information Network' (EBA) distance learning platform to deliver education via web and TV at the same time. In South Africa, TV and radio were prominent as well, and learning was also delivered via social media such as Facebook and WhatsApp groups. In the UK, as well as government backing for the Oak National Academy, which provided online resources to support teachers and learners, the BBC broadcasted primary school programmes. In Spain, 'national television delivered content to those students who didn't have access to the internet at home.'

UNESCO data reveals that the types of technologies deployed to maintain learning continuity during the pandemic largely reflected a

country's development status. For example, two thirds of low-income countries used radio for primary education, compared with less than half of upper-middle income countries. Meanwhile, three quarters of lower-middle income countries used TV. High-income countries, on the other hand, more commonly mobilized online learning platforms to support remote teaching and learning.⁷

Overall, however, digital learning became a feature of education globally in 2020 like never before.

1.3

Global and local challenges

Although schools and universities globally began adapting to remote and digital learning, doing so undoubtedly threw up challenges for all involved. One of the most reported issues during the pandemic was the impact of school closures on already existing educational divides, particularly relating to access to digital resources. OUP's research substantiated both points, with access to technology and devices, such as computers or tablets, being a key differentiator.

6. <https://blogs.unicef.org/evidence-for-action/lessons-from-covid-19-getting-remote-learning-right%e2%80%af/>

7. <https://unesdoc.unesco.org/ark:/48223/pf0000374561>

8. <https://unesdoc.unesco.org/ark:/48223/pf0000374561>

52%

of higher education students said their learning was impacted by slow or unreliable internet connection.

72%

of schoolchildren who were unable to access remote learning live in the poorest households in their country.

1.3.2

Divides within countries

The picture differed within state borders as well. UNICEF reported that globally, 72 per cent of schoolchildren who were unable to access remote learning live in the poorest households in their country. In upper-middle-income countries, schoolchildren from the poorest households account for up to 86 per cent of students unable to access remote learning. The data suggests this has left at least a third of the world's schoolchildren—463 million children globally—unable to access remote learning during school closures. These issues were not limited to school age learners either: a global report by Times Higher Education notes computer and internet access was a key issue in universities too, with some students relying on university support and funding.⁹

Lack of internet connection and the high cost of data also exacerbated divides within countries. One South African respondent from OUP's spotlight survey noted that at a top-tier higher education institution, 15 per cent of students had no online access, no electricity security and no connectivity security. They called it a pandemic of 'equal opportunity' that 'served to showcase... socio-economic inequality in the region.' In India, respondents noted 'unstable

internet connections in some parts of the country' and 'low broadband penetration in semi-urban and rural areas.' The same was said for Spain, while polling by the UK's Office for Students found that 52 per cent of higher education students said their learning was impacted by slow or unreliable internet connection.¹¹

Similarly, access to hardware had a considerable impact on those from disadvantaged backgrounds. A UK respondent commented that there is significant variance around what is taught synchronously vs asynchronously and that 'the digital divide for learners without access to hardware and WiFi is huge.' In India too, 'some students did not have personal devices to be part of online classes.' Likewise, in Brazil, while 95 per cent of higher income households have computers, they are present in just 14 per cent of lower income homes.¹² In the US, although virtually all 15-year-olds from a privileged background had a computer to work on, nearly 25 per cent of those from disadvantaged backgrounds did not.¹³

While all countries reported challenges around student engagement in digital learning, this was undeniably heightened for those from more deprived socio-economic backgrounds, affecting the resources available at both school and home. Whilst these digital divides may have already existed before Covid-19, the rapid switch to online learning has both exposed and deepened them.

9. <https://www.unicef.org/press-releases/covid-19-least-third-worlds-schoolchildren-unable-access-remote-learning-during>

10. <https://campus-cms.prd.timeshighereducation.com/sites/default/files/2021-02/THEDigitalTeachingSurveyspecialreport.pdf>

11. <https://www.officeforstudents.org.uk/news-blog-and-events/press-and-media/universities-response-to-pandemic-could-see-radical-improvements-in-digital-teaching-says-ofs/>

12. https://global.oup.com/news-items/current/nocw_brazil?cc=gb

13. <https://www.weforum.org/agenda/2020/04/coronavirus-education-global-covid19-online-digital-learning/>



The data suggests this has left at least a third of the world's schoolchildren—463 million children globally—unable to access remote learning during school closures.

CASE STUDY

Andy Lewis, Deputy Head at St Bonaventures, London



In responding to the pandemic, we distributed a lot of Chromebooks, as access was a major issue for many students. Our students have a vastly diverse level of access to remote learning; some students are able to work in a bedroom alone on their own devices, while others were sharing with a number of students and even parents all trying to work in the same spaces. WiFi and having a suitable working space was also an issue for some.

Our staff also needed a lot of upskilling; for example on Loom, Google Meet lessons, marking via Google Classroom, self-marking platforms and so on.

Some students quite enjoyed these new ways of working. For staff, Loom has been a great resource and is something we'll use to cover lessons in the future I'm sure. However, the diversity of platforms available has been an issue, as has keeping on top of tracking students. We've also seen a real variety of engagement which makes the return to school tricky. How do you cater for those who have done it all and those who have done very little?

Thinking about whether things have changed for the future, it's hard to say just yet (although we'll never have snow days again!). Going back to the classroom recently has created a whole big swing back to face to face. But people are looking at what tools they can use in the future, such as self-marking tools, which are a sensible development for managing workload.

If we had to repeat the experience, I would try and build in more screen-free time—perhaps one day per week to help support the wellbeing of staff and students.

1.4

Understanding how to use and embrace digital

Another challenge emerged at the beginning of the pandemic in the form of teacher or professor understanding of new tools and platforms. OUP's research showed that a lack of familiarity with digital products led to examples of 'poor digital integration' in Turkey, while a Spanish respondent referred to a lack of understanding how to use digital resources among teachers and students, combined with poor teacher training.

In South Africa, a HE respondent said that 'teaching practice was under-prepared for online teaching modalities, and students were unaccustomed to digital learning.' Other challenges listed included a 'lack of knowledge of online course design' and difficulty enabling 'work-integrated learning and lab-based learning within the digital-only paradigm.'

What's clear is the pandemic has exposed a gulf in skills and promoted a desire to gain more amongst educators. An OUP employee from its English Language Teaching (ELT) Division notes that 'since the start of the Covid-19 pandemic, OUP had already observed a dramatic increase in demand for online professional development events and support,' highlighted by the number of attendees at the first-ever **ELT Together** event in September

2020, and over 23,000 teachers from 166 countries attending the English Language Teaching Online Conference. In another poll carried out by OUP looking into the impact of digital learning on English language teaching, 17 per cent wanted their government to provide more professional development opportunities for teachers and professors.

Although this may have been an abrupt shift for many teachers, it is positive to see it was not necessarily an unwelcome one. A respondent in Spain stated that 'teachers who would never have done so normally have been forced to adapt to digital learning' and that this 'will have a very positive effect in the long run.' Respondents in the UK celebrated that uptake of digital resources had increased among customers who may not have used digital in the past (or very little). This resulted in 'pockets of excellence in managing hybrid learning.'

In South Africa, progress has been made towards the goal of 'develop[ing] a more tech-centric approach to teaching' and supporting the use of ICT 'not as add-ons, but as catalysts to redesign the teaching and learning experience.' And as one Indian respondent said, the country's EdTech sector 'has stepped up, and after struggling initially, administrators, teachers, parents and learners have adapted to digital learning. We are looking at a future scenario where a blend of physical and digital learning will be the new normal.'

What's clear is the pandemic has exposed a gulf in skills and promoted a desire to gain more amongst educators.

23,000
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the English Language
Teaching Online
Conference

02

A YEAR OF DISRUPTION: THE IMPACTS OF THE SUDDEN SHIFT TO DIGITAL LEARNING

It is apparent from the initial challenges faced as a result of the closure of schools, universities, and educational institutions that new styles of learning have impacted on educators and learners across the board. While some of the effects have been negative, particularly in relation to digital divides, for many institutions it has been a positive learning experience, as schools and universities have found innovative, even simple, ways to update their teaching methods.

In this section we consider the short-term impacts on the sudden global shift towards educational delivery digitally, exploring how it has affected learning and teaching, as well as the effects the disruption has had on mental health and wellbeing and educational inequalities.

2.1

The impact on learning

Perhaps the most obvious impact of Covid-19 and school closures has been the disruption to students' learning. Three quarters of those surveyed by OUP said the disruption and uncertainty caused by the pandemic impacted the effectiveness of learning. Learning was happening—and it was increasingly happening digitally—but it was not equivalent to the learning that would have been taking place offline and in person.

An OECD-Harvard Graduate School of Education Survey estimated that the impact of school closures on education continuity was estimated to be at least two months of instruction for half of primary and secondary school students.¹⁴ And according to Save the Children, less than one in 10 children (8 per cent) felt that they were learning as much as they were at school and only 7 per cent felt they were learning a lot. More than eight in 10 children (84 per cent) felt that they were either learning only 'a little bit' (66 per cent) or 'nothing at all' (18 per cent).¹⁵

Taking the UK as an example, OUP research released in October 2020 revealed that in the UK there is

evidence of a heightened 'word gap'—where a child's vocabulary is below age-related expectations—at transition from primary to secondary school. 92 per cent of teachers feared that this has widened following school closures, and 94 per cent said they had found it challenging to support pupils' vocabulary development while teaching remotely.¹⁶

This tallies with Ofsted's November 2020 report (before the second UK lockdown), which found that primary school pupils had experienced learning losses across a range of subjects, or were at the same level as before March 2020. This included a negative impact on Key Stage 1 pupils' social and communication skills, listening skills, speech, phonic knowledge and gross motor skills. Regression in fine motor skills was a particular concern, with some pupils no longer able to hold a pencil.

This was not just the case in the UK. In Turkey, respondents to OUP's survey flagged a breakdown in the quality of teaching too. They stated that some educators struggled to motivate students during online lessons, were unable to conduct lesson plan tasks into their teaching, check attendance and participation of the students, and 'most important of all, they failed to maintain [a] reliable exam environment, resulting in student cheating.'

94%

of teachers said they had found it challenging to support pupils' vocabulary development while teaching remotely

1 in 10

children felt that they were learning as much as they were at school

14. Reimers, F. and A. Schleicher (2020), Educational Opportunity during the COVID-19 Pandemic
15. https://resourcecentre.savethechildren.net/node/18174/pdf/the_hidden_impact_of_covid-19_on_child_education.pdf
16. https://fdslive.oup.com/www.oup.com/oxed/wordgap/Bridging_the_Word_Gap_at_Transition_2020.pdf?region=uk

86%

of teachers in the UK specified that their workload had increased since the implementation of remote education

15%

of teachers reported that their school had managed to align their remote education solution completely to their intended curriculum

2.2.1

A challenging transition

While many schools were quick to adapt and start online classes, in some countries, educators struggled with issues like lack of infrastructure, connectivity, and teacher training. In India, for example, teachers started conducting online classes for synchronous learning, but also struggled to keep track of students' learning progress.

2.2.2

Workload

As outlined in section 1, the move to digital has been difficult for those teachers who lacked familiarity with new tools and platforms. In Spain, one respondent warned that teachers who 'weren't used to digital... struggled with keeping up with online teaching [and] motivating students,' which resulted in them working double hours, unable to take care of their health (both physically and mentally).

Additionally, over four-fifths (86 per cent) of teachers in the UK specified that their workload had increased since the implementation of remote education, according to an Ofsted remote education research report. Only a small proportion of teachers (15 per cent) reported

that their school had managed to align their remote education solution completely to their intended curriculum. Another poll shows that more than one-third of teachers have lost enthusiasm for the job since pandemic began.¹⁸ Still, feedback from OUP's spotlight market respondents in the UK suggests that although they struggled initially, skills and resources have improved as we progressed through the year.

2.2.3

Support for teachers

In several of OUP's spotlight markets, respondents criticized institutions for a lack of support, with 36 per cent highlighting the lack of support for teachers or professors as impacting the effectiveness of digital learning. Respondents in Spain said that while 'overall, the transition to digital learning has gone relatively well,' they still felt that 'more could have been done to support teachers and learners in this transition.' One Spanish respondent called for the provision of 'further teacher training' for remote teaching and distance learning and 'better technological tools for teachers and students,' as parents were not fully equipped to support their children's learning. In Pakistan, respondents criticized a lack of 'focus' towards widespread digital education, which they said 'is also a supply problem.'

'There are still many teachers who do not feel comfortable enough with technology.'

Representative from OUP Spain

17. <https://www.gov.uk/government/publications/remote-education-research/remote-education-research>

18. <https://www.independent.co.uk/independentpremium/uk-news/teachers-enthusiasm-coronavirus-pandemic-poll-b1815214.html>

CASE STUDY

Nidhi Thapar, Vice President, Head Academics, Edunation Services, Karnataka, India

We took a proactive approach that helped us initiate online classes within a week of lockdown being announced. This involved working on the following:

- Identifying a suitable virtual platform
- Ensuring the availability of e-books
- Communicating with parents and students
- Training teachers and students on our virtual platform's features and use
- Training teachers on virtual teaching practices
- Providing learning materials like lesson plans, worksheets, digital resources and so on
- Identifying EdTech tools such as Quizizz and GeoGebra to enhance students' learning experience
- Ascertaining quality teaching through class observations and feedback, sharing of best practices, and so on
- Modifying the syllabus, including assessment patterns and practices

We also took steps to support student and teacher wellbeing through various practices like safety and mental wellbeing sessions, and parent/teacher/student engagement activities.

Thinking about how students adapted, what worked well, and what could have gone better, the geographical location of schools had a big impact. Students of Pune, Hyderabad etc. have taken to the new ways faster than places like Jaipur. The primary reason for this has been the internet connectivity and availability of devices.



While students have adapted fairly well to virtual schooling, better engagement has been evident wherever teachers have made connections with the learners, used EdTech tools and resources, and conducted group activities, like quizzes and polls. The availability of teaching and learning materials, teacher training, quality management measures, and parent and student engagement activities made the journey easier. However, parent and student angst with regards to screen time always came as a roadblock, despite all safety aspects we took into account.

There has been a significant impact on how digital learning was viewed in the pre-pandemic times, compared to the present day. Even those who didn't think it would be an option have equipped and upskilled themselves to the new ways. EdTech companies have flooded the education space, while educators explored various tools and features to make learning joyful. This is something that will stay.

In a post-pandemic future, digital learning resources will be a great way to ensure blended/flipped learning. We are even thinking about having different learning centres within the classrooms, including a digital resource centre.

2.2.4

Pressure on parents

The experience of guiding children through often unfamiliar online learning platforms, while balancing their own work and family commitments, as well as managing the economic impacts of the pandemic, has placed immense pressure on parents. In the UK, parental stress, depression, and anxiety have increased since national Covid-19 restrictions were introduced, according to a report from the Oxford University-led Covid-19 Supporting Parents, Adolescents, and Children in Epidemics (Co-SPACE) study, based on data from over 6,000 parents.¹⁹ Equally in Turkey, research from the OECD showed that while 87 per cent of students 'agreed' or 'strongly agreed' that their parents support their educational efforts and achievements (compared to an OECD average of 89 per cent), the academic support of parents to students could be 'hindered by language barriers.'²⁰

To give one example, respondents in India outlined that the financial strain on parents in turn impacted schools: 'Many parents have not been able to pay the fees for their children, adding further to the strain on the schools to keep going despite the lockdown that has lasted almost the entire academic session.' According to Save the Children, among children who reported that they needed someone to help as a learning obstacle, a higher proportion of them were also from a household where the parent/caregiver reported needing parenting support (45 per cent).²¹

In the UK, parental stress, depression, and anxiety have increased since national Covid-19 restrictions were introduced

'The abrupt transition to digital learning was unexpected and chaotic in South Africa.'

Widely termed "emergency remote learning," as distinct from truly efficacious digital education, it required academics to learn about, and engage with, digital delivery and course design, and to function, in a crisis mode. It was acknowledged that practice did not represent desirable pedagogies and modalities that are well designed to support effective education, but, rather, that it simply functioned to assure some form of continuity. Ultimately, progress has been made and useful learning accomplished, but it cannot be said that this practice is as optimal as it might be.'

South African respondent

19. <https://www.ox.ac.uk/news/2021-01-19-parental-mental-health-worsens-under-new-national-covid-19-restrictions>

20. <http://www.oecd.org/education/Turkey-coronavirus-education-country-note.pdf>

21. https://resourcecentre.savethechildren.net/node/18174/pdf/the_hidden_impact_of_covid-19_on_child_education.pdf

2.3

Mental health and wellbeing

In OUP's spotlight markets, respondents warned that disrupted learning led to 'very patchy coverage of the curriculum,' which impacted not only children's learning but their mental health. Respondents said that it led to 'anxiety and expected lower outcomes in the exams' which in extreme cases, caused students to question their 'future life chances.'

In an OUP teacher panel, 78 per cent also said that the shift to digital learning has raised concerns about learner wellbeing. When expanding on the reason for increased concern, some of the issues raised included high amounts of screen time, lack of direct teacher support, general fatigue, lack of routine, anxiety about what's going on around them, and isolation.

Research from Save the Children too, showed most children (84 per cent) whose schools were closed due to Covid-19 reported an increase in negative feelings. In comparison, just over half (56 per cent) of the children who were going to school in person reported a similar increase. The longer the schools were closed, the more likely parents and caregivers were to observe signs of distress in their child, such as changes in sleep and ability to handle emotions, as well as more aggressive behaviour.²²

Furthermore, children's language analysis in Australia identified 'many references to the amount of troubling news stories being overheard and a lot of descriptions of stress and anxiety.'²³

It's not just pupils' mental health that has been affected, but educators' too. A report from Education Support, assessing the impact of coronavirus on education professionals' mental health, found that 52 per cent of teachers felt their mental health and wellbeing had suffered. According to a Times Higher Education Digital Teaching Survey, more than half of respondents said the initial move to online teaching had a negative effect on their mental health, and nearly six in 10 believe it hit their students' mental health.²⁴

There is increasing evidence that mental health influences learning outcomes. One OUP study showed a positive relationship between wellbeing and academic attainment. For example, 'a large meta-analysis of 213 school-based, universal social and emotional learning programmes²⁵ found that students' participation in social and emotional learning programmes had an impact on their academic achievement equivalent to 11 per cent.'

In our spotlight markets, 17 per cent of respondents said that poor wellbeing among learners, teachers and professors had a negative impact on the effectiveness of digital learning, with a third calling for increased government support for mental health and wellbeing.

78 per cent felt that the shift to digital learning had raised concerns about learner wellbeing in their sector/market.

2.4

Increasing educational divides and inequalities

Students from different ethnic and cultural backgrounds, socio-economic classes, and with varying learning and physical requirements have all been affected by the switch to digital learning in different ways.

However, as stated earlier, in many cases, a key contributing factor to disparities in learning, between both countries and communities, has been the varied access to digital resources for students, as well as to the associated technology for the delivery of such teaching.

In the short-term, this has had a significant impact, in the following ways:

2.4.1

Disadvantaged learners

Difficulty accessing digital resources has disproportionately affected those from lower incomes. Nearly four in five (79 per cent) of those surveyed felt that disadvantaged learners had struggled to access education during the pandemic; and that socio-economic barriers have had a negative impact on the effectiveness of digital learning (78 per cent). One UK respondent was concerned that this had 'increased school dropout rates.' Research by the Sutton Trust in the UK has found that 30 per cent of middle-class pupils were doing live or recorded online lessons at least once per school day, compared to 16 per cent of working-class pupils.²⁶ Another study has found that schools with more disadvantaged pupils narrowed the gap in usage of online maths platforms with those in affluent areas during lockdown, but achieved lower levels of student engagement.²⁷

78%

believe socio-economic barriers have had a negative impact on the effectiveness of digital learning

Worryingly, 85 per cent of respondents also said the pandemic and the switch to digital learning has seen learners from disadvantaged backgrounds fall behind their more advantaged peers. Three fifths felt this has affected the overall wellbeing of disadvantaged learners. A global report from Times Higher Education supports these findings, with 63 per cent of university educators believing that online teaching is at greater risk than traditional teaching of leaving behind students from non-traditional backgrounds, such as underprivileged, first-generation and mature students.²⁸

78%

of a teacher panel said that the shift to digital learning has raised concerns about learner wellbeing

52%

of teachers felt their mental health and wellbeing had suffered

22. https://resourcecentre.savethechildren.net/node/18174/pdf/the_hidden_impact_of_covid-19_on_child_education.pdf
 23. Quote from Anne Bayetto, literacy expert at Flinders University who analysed Storyathon submissions. More information on the report can be found here: <https://www.oup.com.au/primary/literacy/storyathon/storyathon-insights>
 24. <https://campus-cms.prd.timeshighereducation.com/sites/default/files/2021-02/THEDigitalTeachingSurveyspecialreport.pdf>
 25. https://www.casel.org/wp-content/uploads/2016/08/PDF-3-Durlak-Weissberg-Dymnicki-Taylor_-Schellinger-2011-Meta-analysis.pdf

26. <https://www.suttontrust.com/wp-content/uploads/2020/04/COVID-19-Impact-Brief-School-Shutdown.pdf>
 27. <https://www.nesta.org.uk/data-visualisation-and-interactive/levelling-maths-during-lockdown/>
 28. <https://campus-cms.prd.timeshighereducation.com/sites/default/files/2021-02/THEDigitalTeachingSurveyspecialreport.pdf>

CASE STUDY

Begoña Urruticoechea, English Teacher, Eibar, province of Gipuzkoa, Spain

I became a teacher because I was passionate about language and teaching. I also wanted a career where I learned and evolved constantly, and this pandemic has proved that we need to be ready for different situations.

Last year, we said goodbye to our colleagues to start teaching from home. We were not sure about being ready, or what the students' reactions could be, but we had to do it. It was a moment of challenge; first, we had to check what kind of material we had and what tools we were able to use. I was lucky that I already had experience of some of the new systems and my students were able to follow the lessons through a platform called Moodle.

The difference was that we had to be in touch online. Additionally, many students had to work from home—there were very funny moments in which they had their children playing, chatting or trying to join the lessons as well.

It was a challenge, but colleagues helped each other a lot. We had a lot of support from publishers as well, who gave us free materials and advice, and the students were really understanding. I think 'collaboration' was a key word in this situation.

We used Moodle to run the course but to support communication we also used Bibliobutton. Other times, we had meetings with teachers and colleagues using Jitsy and Zoom. Our lack of knowledge was sometimes a problem, but things went quite well considering what was happening.

A tip for teachers who are in this situation: try to be in contact as much as you can with your students, especially to know what they need. You cannot do this 24-hours a day but knowing exactly what they need will help you.

A quote that I always keep in mind is that education is a human right. It's a passport to teach you things, to lead you everywhere. English could be a passport to new experiences, to meet people, to know about other cultures, to travel around, to communicate internationally. This passport is essential for empowering students in the 21st century to improve their lives and their knowledge.

It's important to try and transmit the enthusiasm you have for teaching—to evolve and learn new things. And make sure that you are confident. It will reassure your students that you are there to teach, to guide them, to help them. It will make them feel at ease, interested, and motivated.



79%

of those surveyed felt that disadvantaged learners had struggled to access education during the pandemic

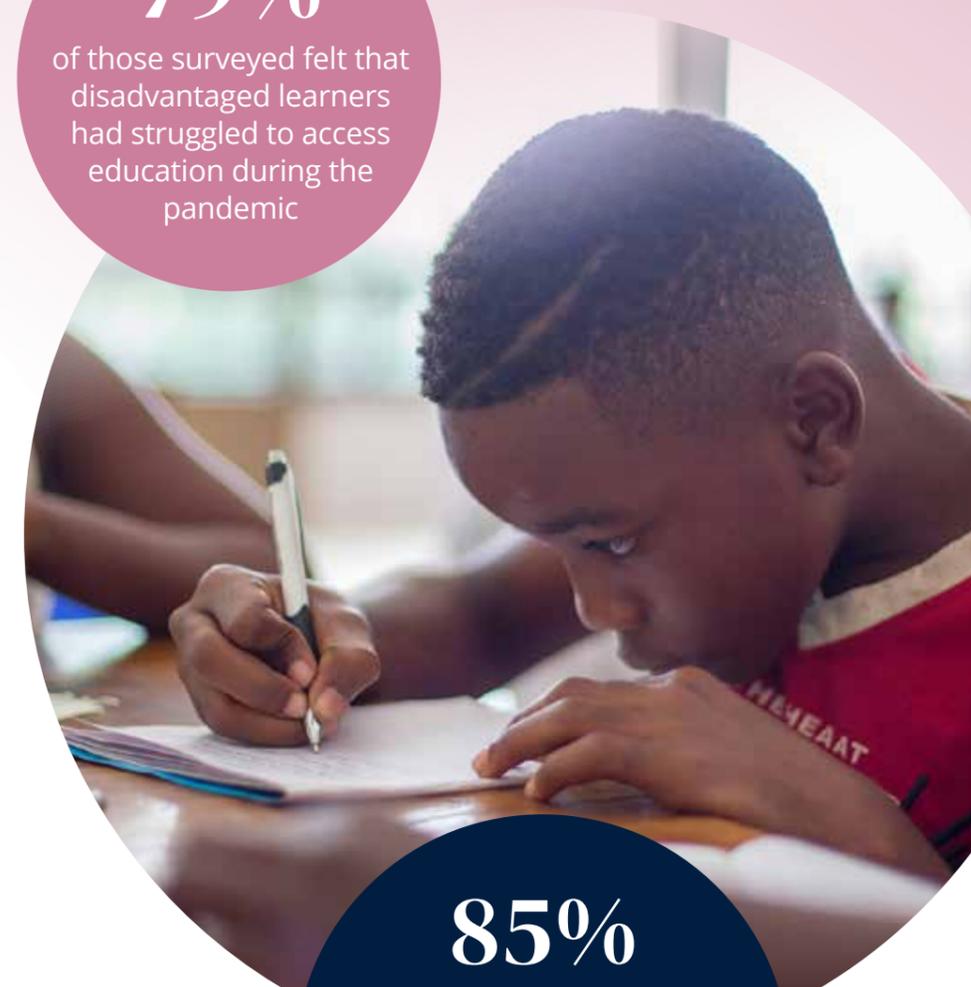
2.4.2

Widening the divide between state and private schools

Several spotlight markets reported stark differences between the public and private school experience. In Spain, respondents said that the digital transition was 'more or less good for the private school' sector but public schools faced multiple problems with teachers lacking digital materials like e-books. In Turkey, respondents warned that although public schools have failed to implement digital learning equally across the country, private ones have achieved it to some extent. Indian respondents explained that 'private schools have transitioned but not government schools' and warned that 'lower end schools that form the bulk of schools in India have not [switched seamlessly, therefore] depriving children of continued education.' A HE respondent in South Africa said that the market was 'very fragmented,' with 'well-resourced institutions with wealthier students' having coped well, compared to 'poorer institutions [which] have not had the infrastructure, technology, digital skills to implement digital learning.'

85%

of respondents said the pandemic and the switch to digital learning has seen learners from disadvantaged backgrounds fall behind their more advantaged peers



The transition to digital learning serves only a part of the student population... many students within the region [South Africa] do not have access to basic resources, such as data, electricity, connectivity, knowledge capital or a quiet place to study. For this reason, digital-only learning has been deeply problematic for many under-resourced students, and, consequently, some university outputs have declined.

2.4.3

Societal inequalities

In India, respondents warned of the impact of the transition to digital learning on the education of girls, especially where, they said, 'the family has been unable to provide multiple devices to children within the family.' While this is one specific example, there is increasing evidence that the pandemic has increased race and gender inequalities, and this has not precluded education. A McKinsey study last spring found that US students of colour were about three to five months behind in learning, compared to white students who were about one to three months behind.²⁹ Educators also warned that 'pupils who have lower language levels are likely also to have suffered more. For example, EAL [English as an additional language] children have less exposure to English.'³⁰

2.4.4

Neurodivergent learners

Children and students with additional physical, behavioural or cognitive learning needs have also been disproportionately affected by lockdown measures. In the UK, Ofsted's November report found that children with additional educational needs and disabilities have been 'seriously affected' across all age groups, both in their care and education, losing vital support including speech and language services.³¹

2.4.5

Urban-Rural divides

In countries with large rural populations such as India, the uptake of digital learning was reportedly 'quite significant' in major metropolitan cities, but due to infrastructural challenges and inadequate training, the impact of digital learning has been 'muted' in smaller cities and rural areas. In South Africa too, it was noted that the experience varied from province to province; overall much of this has been linked to broadband coverage.

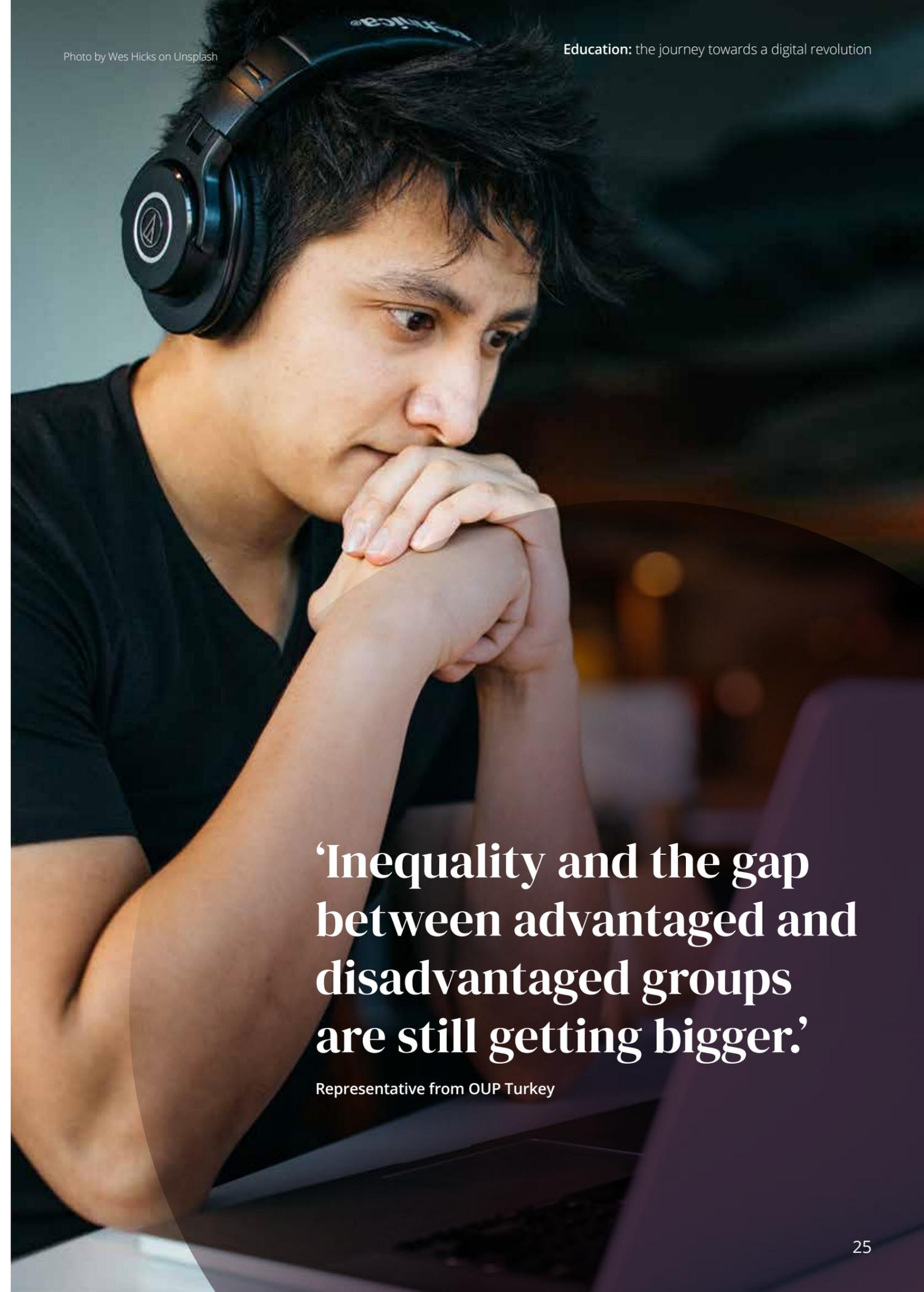
'Inequality and the gap between advantaged and disadvantaged groups are still getting bigger.'

Representative from OUP Turkey

29. <https://www.mckinsey.com/industries/public-and-social-sector/our-insights/covid-19-and-learning-loss-disparities-grow-and-students-need-help#>

30. <https://www.bell-foundation.org.uk/app/uploads/2021/03/University-of-Oxford-Report-March-2021.pdf>

31. <https://www.theguardian.com/education/2020/nov/10/children-regressing-and-struggling-mentally-in-lockdown-says-ofsted>



03 SPOTLIGHTING MARKETS

Overcoming the challenges posed by digital learning over the last 12 months has been a massive learning curve for educators, institutions and policymakers. As a respondent to our survey based in South Africa emphasised ‘we remain within a period of experimentation, observation, learning and development.’

The result of this learning has, in many cases, been innovation and new pedagogies that have enabled students and teachers to adapt. Global organizations such as the Organisation for Economic Co-operation and Development (OECD) and the World Bank have been collecting information on how different countries have responded to school closures,³² as well as the technologies they have used.³³

OUP's survey too has highlighted some useful examples of how the education sector has adapted to deliver digital learning successfully. Countries across the world provided free access to learning resources. South African educators found that 'free access for digital textbooks via Snapplify was very successful in schools,' as well as 'simple video lessons' that 'had over a million views during the lockdown.' In Spain, Turkey, and the UK too, 'publishers made digital content accessible for free' and 'opened digital sources to institutions.'

In Brazil, to ensure that everyone understood how to use these resources effectively, where Flipped Classroom was introduced, some schools held online meetings with families to explain why those changes were made and to reassure parents and carers that they would still be in line with the text books.

In Turkey, personal development sessions have been organised to support teachers. With 'the help of OLB [Oxford Learner's Bookshelf], and OTC [Oxford Teacher's Club], teachers had the chance to learn how to use CPT [Classroom Presentation Tool] efficiently, and things to consider when delivering online courses, from the seminars given through OTC.' An educator in the UK also stated that 'webinars and podcasts to deliver support and personal development to teachers [have] seen a massive increase in engagement.' For example, OUP's Oxford Owl service, which supports children and parents at home, has been receiving more than one million visits per week.

OUP's Oxford Owl service, which supports children and parents at home, has been receiving more than one million visits per week.



32. <https://oecdutoday.com/coronavirus/continuity-stories/>

33. <https://www.worldbank.org/en/topic/edutech/brief/how-countries-are-using-edtech-to-support-remote-learning-during-the-covid-19-pandemic>

04

WHAT CONCLUSIONS HAVE BEEN DRAWN SO FAR?

The events of the last year have had an impact on multiple aspects of education, at all levels including schools, universities and English Language Teaching. The shift to online learning and digital tools came with no preparation, and none of the training or infrastructure development that would normally have predicated such a change. As technology has increasingly become embedded in every aspect of our lives, it was arguably inevitable education would eventually shift this way too. But unquestionably the pandemic has accelerated the adoption of EdTech and digital learning in schools, colleges and universities, perhaps by as much as five years according to one estimate.³⁴

This has undoubtedly been a challenging period, but already there is a suggestion that it could bring about positive outcomes in the long-term. All those surveyed by OUP expect digital to continue to be embedded in education in the future, bearing out predictions by the WEF in April 2020 that 'a new hybrid model of education will emerge, with significant benefits.'³⁵

The following section sets out key conclusions that can be drawn, with a view to thinking about how digital learning can be embedded and delivered in the medium to longer term.

4.1

Students and teachers have struggled with digital learning—but confidence is growing

'Changes take time and this has been too abrupt,' commented one Spanish respondent. Another pointed out that the pandemic was the first contact for many teachers with a digital platform or a digital license for a book. An Indian respondent highlighted that 'student focus and engagement in online mode is far from satisfactory' while 'teachers have struggled with use of digital pedagogical tools;' and a Spanish respondent warned of 'challenges when motivating students,' while others agreed that 'learners' learning achievement levels have been impacted.'

Yet despite this, confidence is growing, with, according to one Turkish respondent, 'more digitally literate teachers and students.' In OUP's teacher panel, before the pandemic, 43 per cent said they were confident or very confident in delivering digital learning, and 31 per cent were not confident; now, 93 per cent are very confident or confident compared to just one per cent saying they are not confident. There has also been a clear increase in demand for online professional development opportunities for teachers, as demonstrated by 23,000 attendees signing up to OUP's English Language Online Teaching Conference (ELTOC) event in 2021.

One UK respondent in the spotlight market survey suggested that 'although there is some way to go' we are seeing signs of a 'more confident and upskilled teacher workforce,' both at primary and secondary level, and more understanding of support digital resources can provide. Another respondent suggested there was now 'much greater willingness to see the opportunities of digital learning blended with print,' while a Turkish respondent said that post-pandemic, 'teachers will be more informed about what tech can do and feel more confident about implementation.'

Teachers have become more confident on working with technology

43%

said they were confident or very confident in delivering digital learning before the pandemic

93%

are now very confident or confident, delivering digital learning, compared to just one per cent saying they are not confident

34. Jacqueline Daniell, chief executive of Wey Education, says the pandemic has accelerated this by about five years Digital Learning 2020: <https://raconteur.uberflip.com/i/1285565-digital-learning-2020/1?>

35. Briefing authored by Cathy Li and Farah Lalani <https://www.weforum.org/agenda/2020/04/coronavirus-education-global-covid19-online-digital-learning/>

4.2

The digital revolution is underway

According to one Turkish respondent, the 'digital revolution is on its way'—sentiment which is supported by recent analysis of online education during the pandemic which showed that 'the experience of teaching and working from distance online is a good opportunity and provides more flexible possibilities...[and] will generate a new way for access to lifelong learners.'³⁶ Meanwhile a South African respondent spoke of 'a digital and pedagogical transformation.' In some countries, such as Australia, there has also been discussion around whether or not the pandemic will result in the end of the lecture within Higher Education settings.³⁷ Such predictions may seem overblown, but 98 per cent of those surveyed said they anticipate that digital learning will continue to be embedded in their country in the future, and in our teacher panel, 44 per cent said the shift towards digital learning has changed education for the better.

Although educators, learners, and governments have strained to return to in-person teaching, it's clear the progress around digital learning means this will no longer be the default. This is partly because, as one Spanish respondent said, 'teachers have realised the benefits that the digital environment can bring to them... routines have been established that will stay forever.' This might be because teachers now recognise digital resources can save time, as one UK teacher predicted, or because there is now more

trust in 'the quality of some digital resources, and the benefits they will bring;' to quote a Spanish educator: 'teachers and learners know now our rich digital offer' that they previously were not able to take full advantage of.

4.2.1

The future will be hybrid—but digital is not a replacement for in-person teaching

The survey respondents were united in agreeing that, as one Brazilian educator put it, 'blended learning is here to stay.' Although some expressed doubts about change in the short-term, the expectation is that a hybrid model will ultimately emerge with online and offline methods supporting each other. 'We may see a short-term return to non-digital resources. However, I think there has been a change in teacher/student perspective on the potential of digital learning,' said one Spanish educator. 'I think it will be a mixed, digital and face-to-face education.' A UK respondent suggested 'there is no doubt that live lessons, recorded lessons, use of platforms that support allocation of work, automarking, etc. will all continue to be important for the foreseeable future.' In South Africa, there was a suggestion digital would particularly be a feature in assessment.

However, if a year of education shutdowns has taught us anything, it's the role and value of the teacher, along with the pros and cons of technology use. While there are clear benefits, teachers also found it harder to motivate pupils remotely.

In some cases, this resulted in a 'loss of learning,' as one UK respondent put it, with decreased engagement as time went on—although another flagged the upside of the situation encouraging independent learning and reducing peer pressure for some. Digital tools have allowed teaching to continue, but nonetheless there have been 'fewer opportunities to catch students who are falling behind' and even an 'increase in cheating,' as well as students 'questioning the value for money of education.' One respondent in India noted 'social interaction, group project work and the teacher's ability to pay attention to individual students has suffered.' In Turkey, one observed that 'students' level of socialising, interacting with their peers and teachers, doing exercises and moving outside of the class parts were missing.'

This was further reflected by research into children's language from OUP Australia, conducted through its partnership with Storyathon, the largest story-writing event in Australia; analysis demonstrated that 'children yearned for social connections that are hard to substitute outside of the classroom environment.'³⁸

Equally, the pandemic has shown the importance and value of the support parents and carers provide within education. They have naturally become a lot closer to learning—and indeed closer to some of the digital platforms used to support education—and will likely continue to play an important role in education in the future.

CASE STUDY

Patrick Taylor, Deputy Head Curriculum, Chenderit School, Middleton Cheney, Oxfordshire

In both lockdowns we maintained our planned curriculum, with only slight changes in the sequencing of tasks. We explored live lessons with Google Classroom during the first lockdown, then went into them wholeheartedly in the second. From January onwards we were running approx. 25,000 live lessons per week. We had a small number of students in school, but managed to provide support and equipment to get all other students online. We also conducted our mock exams online and got 1,100 scripts back electronically in a week.

Our students have generally adapted well. We have tracked attendance to lessons online and communicated with those who are harder to reach. Some students have worked better at home, although monitoring their engagement is hard when you cannot see them. Differentiation and pace can also be hard to judge when you cannot spot who has completed a task and who has not.

Overall, parental response has been very positive. For example, a Year 8 parent last week said that she had been really impressed, that we had got it 'down to a t' and couldn't really do it better.

There have been some technical challenges—for example, it is hard to present to students and monitor the chat function at the same time. However, staff have learned how to use the

Google Suite and our online staff training has been some of the most successful we have ever run. As one experienced colleague said: 'I have never known a learning culture like it.' Now that they have learned the software to enable remote learning, they are more confident users of IT, and many will continue to use it, for example when setting homework. I personally have used Google Docs with my A level students to encourage them to question and comment. I type my questions, and they type their answers in real time. It means that instead of getting three or four-word spoken responses, I get more detailed answers multiple times during a lesson, from all students.

Now that students are back in school again, they have started to bring their laptops into lessons. In the future, I would like to see all staff and students being confident digital operators who make as well as use content.

The pandemic means we have made many years' gain in skills in just one year. We are really proud of the work we have done on remote learning—it is probably one of the greatest successes we have had, in my many years of teaching here!

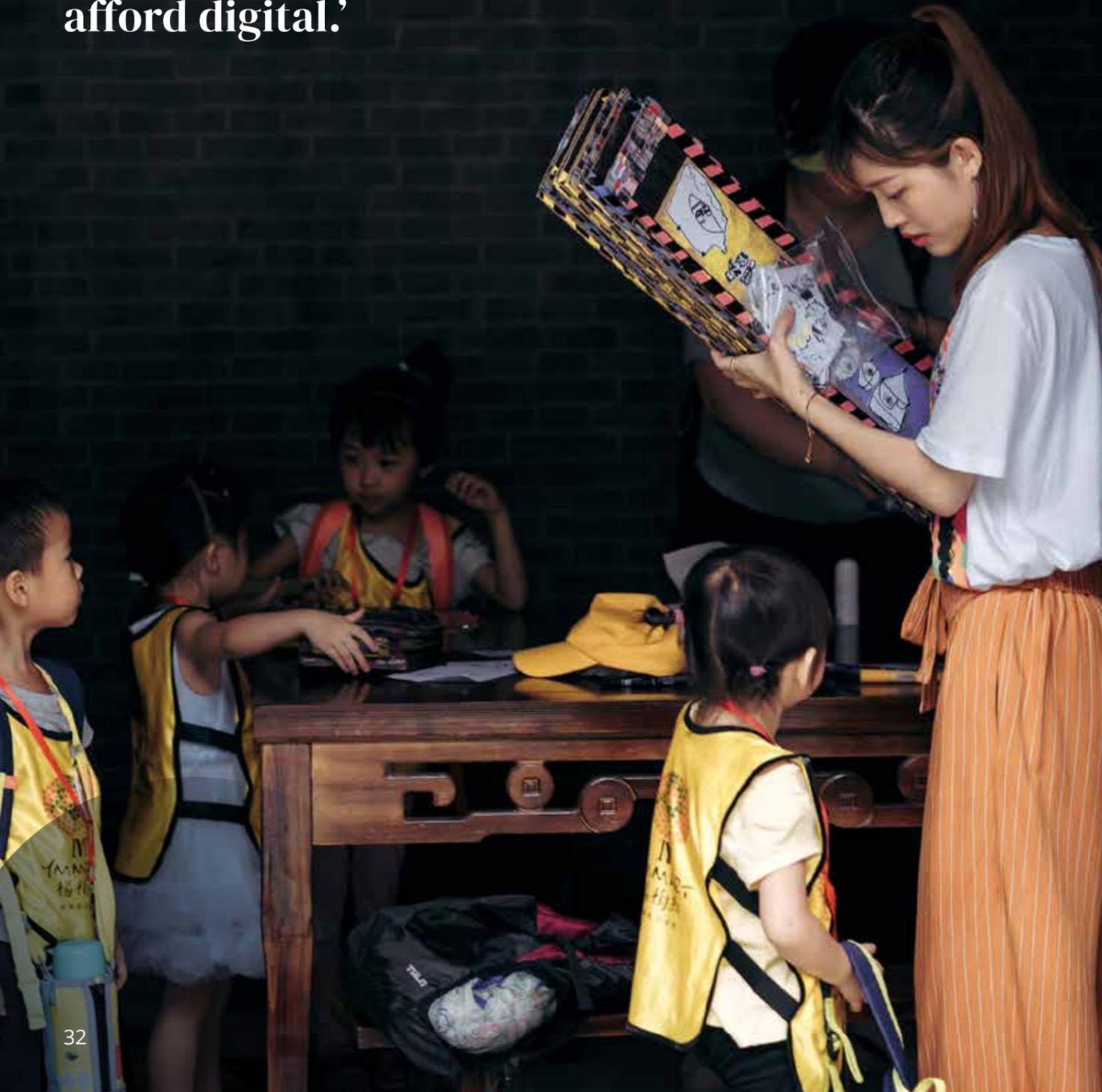


36. <https://www.aa.com.tr/en/analysis/analysis-the-impact-of-online-education-during-covid-19-pandemic-in-turkish-higher-education/2163525>

37. <https://www.timeshighereducation.com/news/lectures-way-out-australia-and-new-zealand-says-survey>

38. https://www.oup.com.au/_data/assets/pdf_file/0030/172758/CWOTY-2020-media-release-Final.pdf

Across the board, educators agreed that the pandemic has ‘widened the gap between the advantaged and disadvantaged learners... learning continued for those who [could] afford digital.’



4.3

Digital has helped, but we cannot avoid knock-on effects from the pandemic

Across the board, educators agreed that the pandemic has ‘widened the gap between the advantaged and disadvantaged learners... learning continued for those who [could] afford digital.’

Reintegrating back into the classroom after long periods out, especially for those who have fallen behind, ‘will take time and effort,’ as one UK respondent noted, while a Spanish respondent highlighted a worrying ‘learning gap.’ In India, teachers struggled to complete curriculums ‘and many schools have had to drop substantial chunks of learning concepts across grades,’ which will likely have knock-on effects for the next academic sessions.’ One South African respondent warned ‘richer schools will transition to digital/blended solutions much more quickly.’

The clear conclusion is that technology must be open and accessible to all: UNESCO’s Global initiative Futures of Education published a report in June 2020, which recommended that the world ‘make free and opensource technologies available to students and teachers.’³⁹ This may not be realistic, but there will need to be a conversation to prevent global digital learning divides deepening further.

In the long-term this could also make education more open. In South Africa, one respondent commented that the shift to digital learning has actually ‘highlighted the importance of prioritizing social justice... there is a new focus on reaching masses (democratization of education), and a new interest in data-driven development.’

4.4

We need to be mindful of learner wellbeing

During the pandemic the WHO issued advice that toddlers and young children should have no more than one hour of sedentary screen time a day.⁴⁰ Yet the reality is that most children will have spent more time on screen in the last year, as will learners of all ages, and there are clear wellbeing implications to learning remotely and without face-to-face connection, and the ‘impact on social skills,’ as one UK respondent suggested. As captured in section 2, research among OUP’s teacher panel also demonstrated significant concern for learner wellbeing as the result of isolation, lack of support, and general anxiety about the uncertainties in the world around them.

However, the impact of the pandemic on wellbeing will differ between different individuals and age groups; as one Turkish respondent put it, the switch to digital might have a more negative effect on the wellbeing of younger learners, while older students ‘might enjoy the flexibility of digital learning.’ Nevertheless,

institutions will likely have to consider how to support young people’s wellbeing—and indeed the wellbeing of teachers too—whether learning takes place remotely or in a classroom, to support learning outcomes.

4.5

Digital will be used to do things differently, in creative ways

Thinking of digital as a replacement is the wrong approach; we should be looking at where it adds value and helps creativity. ‘Long term, with increased teacher confidence and openness to digital solutions, I anticipate more innovation, interrogation as to how digital can support workload and general time-consuming administrative tasks, including parent evenings; more flexible ways to support pupils’ learning and generally drive forward greater personalization both in content delivery and assessment,’ said one UK respondent. Jisc’s Spring 2020 report, *The Future of Assessment*, also suggests that over the next five years, universities must embrace technology to transform assessment in five ways: so it is more authentic (preparing the learner for using knowledge in practice or at work); accessible (to those with both long-term and short-term disabilities or mental health issues); appropriately automated (easing teachers’ workload); continuous (adapting to lifelong learning and the changing world of work); and secure (avoiding cheating).⁴¹

39. <https://unesdoc.unesco.org/ark:/48223/pf0000373717/PDF/373717eng.pdf.multi>

40. <https://www.theguardian.com/world/2021/jan/22/parents-on-childrens-screen-time-in-lockdown>

41. <https://www.timeshighereducation.com/hub/jisc/p/how-has-coronavirus-accelerated-future-assessment>

4.6

Teachers will want quality tools that deliver impact and achieve learning outcomes

In the hybrid education model of the future, teachers and learners will expect more out of the tools they use. It is likely that teachers will become more discerning about which products and services they use, and prioritize easy to implement tools that take some of the strain and that keep children on track. They will want quality, underpinned by pedagogy.

As one UK respondent noted, 'the pandemic has also given rise to a huge amount of free support... and this, alongside new teacher-generated content, has broadened the access to content and again raised questions around value, quality.' A South African respondent stressed that 'the availability of quality, curated materials is essential,' while another South African educator pointed out that 'more digitally savvy students' will mean demand for 'better blended learning products.'

4.7

Now is the time for investment

The experience of the last 12 months will certainly have sharpened focus on the importance of investing in building a digitally enabled education offer, and 'the need for robust platforms capable of effective delivery of teaching, assessment, training' as one Indian educator put it. And in some instances, this is now a priority for politicians. In South Africa, one person suggested 'there's definitely a much stronger focus by governments and educators to start moving (or at least thinking) about ways in which to move to digital.' But another sounded a note of caution about the likelihood that 'funding and infrastructural challenges will deepen in the long-term.'

Undoubtedly, the EdTech market will grow. HoloniQ reported that global investment of venture capital in EdTech more than doubled from \$7bn in 2019 to a record \$16.1bn in 2020.⁴² The evidence is that investors think digital learning is a growth market worth investing in.

\$16.1 billion

was invested in EdTech in 2020, up \$9.1bn from 2019

42. <https://www.holoniq.com/notes/16.1b-of-global-edtech-venture-capital-in-2020/>

43. <https://campus-cms.prd.timeshighereducation.com/sites/default/files/2021-02/THEDigitalTeachingSurveyspecialreport.pdf>

4.8

This is only the start of a journey

It is likely that teachers, parents, and learners alike will have experienced the worst of digital learning early on in the pandemic, as education institutions scrambled to respond to changing, uncertain circumstances. However, as we have seen over the past year, digital and pedagogical transformation has—and will continue to—evolve. As one UK respondent commented, teachers have been able to 'sustain learning levels with remote teaching' but have not yet 'worked out an effective pedagogy that utilizes digital to its fullest.' In Pakistan, one respondent claimed there is still 'a sense of confusion on how this will work out.'

There may be initial disruption, but over time teachers and students will get to grips with the tools, the balance between the two, and what works best, provided the right level of training is offered. But expectations will rise; even if much of learning reverts to the classroom or lecture theatre, digital will no longer be a 'nice to have' but will need to be embedded. This could mean students rating institutions based on the quality of their digital offering, rather than on other traditional criteria, as one survey of UK academics suggested.⁴³

Institutions now know that digital must be a consideration. As a Spanish respondent commented, 'digital learning will probably be a lot more common than it was before the pandemic. However, there's still a long way to go to provide quality digital education for all learners regardless of their background and socio-economic situation.'

Country by country: predictions for the future



India:

- There will be significant demand for blended products across the spectrum that can demonstrate improved learning and support effective teaching.
- Teachers will continue to use some of the digital learning tools and assets to enable learning.
- A hybrid model with a healthy mix of remote/online learning with face to face learning.

UK:

- Although print won't disappear, there will be a long-term hybrid method of delivering education and an increased use of digital compared to before lockdown.
- Blended learning and active learning will become the norm.
- Hybrid learning could remain to support increased parental engagement as well as providing more personalized education.
- There will be a potential rethinking of assessment models, particularly at GCSE.

Pakistan:

- There should and will be a shift towards blended learning.

South Africa:

- The educational landscape will change, with new participants and solutions that might not currently be visible. Digital will be a permanent feature of learning and therefore all learning materials development must take that into account. This will remain blended.
- For some time, learning will remain a blend of traditional materials (including print) and innovative digital materials and modalities—but the switch to digital will happen quicker than expected.
- The socio-economic challenges of the region distinguish its trajectory from that of the more developed world, and more diverse and fundamental forms of support are required.
- Devices and infrastructure will be improved in all schools.
- Long-term switch to platforms for video type content and assessment.

Brazil:

- Remote delivery will be incorporated into learners' daily work, at least for extra content or out-of-classroom tutoring.

Spain:

- Digital learning will become a lot more prevalent and continue to grow in importance.
- Increased use of online resources—digital learning isn't going anywhere, any time soon.

Turkey:

- Flexible solutions for all types of education.
- A continued move towards blended and hybrid learning.

RECOMMENDATIONS

Based on the insights gathered through OUP's research, we suggest the following recommendations for educators and governments:

1. Governments should actively collaborate and learn from teachers and students and use their recent experiences to inform future policy and curriculum development.
2. Governments need to work with institutions to address the digital learning divide, not just now, but for the future too.
3. Wellbeing must be considered as part of education policy—including support for teachers and parents.
4. Curricula should evolve to provide learners with the skills they need to be both digitally fluent, and adaptable to whatever the future holds.

5. We must not assume a 'one size fits all' approach when it comes to digital learning and must consider individual circumstances.
6. Teachers must be brought along the digital journey and supported via professional development.
7. As institutions start to return to the classroom, they will need to develop strategies to support re-integration and learner motivation.
8. Quality content and learning outcomes must be put back at the heart of learning, rather than focusing on learning platforms and methods of delivery.

Many of the recommendations listed above cannot be done in isolation; instead, they require collaboration from across the international education community.

The pandemic has set learners, educators, education institutions, and governments on the path towards a digital revolution. Over the past year, we have seen both the opportunities and challenges digital platforms and resources offer to the education sector. As vaccines for Covid-19 are distributed all over the world, many are, understandably, hopeful for a return to how things were pre-pandemic.

However, the education sector has seen significant change, and has an opportunity to redefine and reimagine itself to meet the needs of learners—and indeed, global society—in the future.

The pandemic has set learners, educators, education institutions, and governments on the path towards a digital revolution. Over the past year, we have seen both the opportunities and challenges digital platforms and resources offer to the education sector.

CASE STUDY

Suzie Prince, Acklam Whin Primary School, Middlesbrough, UK

To meet our children's needs, each year group had its own digital learning programme. We did not provide live lessons—a decision made in response to parents' feedback, to help working families. It meant they could support their children when it was convenient for them. Instead, we had twice a week Zoom meetings where teachers could respond to the children and support any difficulties.

The children adapted, as did we; we kept evolving our digital offer, learning from the previous lockdown. Ensuring pupil engagement over the longer lockdown period was challenging, but all children were monitored, and their engagement recorded. If some subjects were not being completed, this was mentioned in a weekly welfare call that teachers conducted for every child so additional support could be provided.

The weekly calls worked well; the children loved receiving calls from their teachers and parents appreciated the support and encouragement. We also ran weekly Zoom 'get togethers' for all pupils so the children could see one another. Pupils that required additional outside agency support for special educational or wellbeing needs also received it via Zoom. While this worked well for Key Stage 2 (KS2) children, it was less successful for our younger children who found it difficult to communicate over a screen.

All children and families were offered digital and paper resources and the majority preferred the digital offer. But digital learning cannot replace communication. We have found in

Early Years particularly that our children are significantly behind with their oracy skills—phonics, mathematical understanding, and social skills—as they have not mixed with peers or had exposure to professionals' exposition of language. In Key Stage 1 and 2, letter formation, demarcation of sentences, mathematical understanding and non-negotiables in writing have all seen a significant decrease in achievement.

Without doubt, the live interaction/telephone calls/Zoom calls were the most popular and enjoyable for children and parents. It was also clear that some struggled at times with the level of the work, motivation, and what to do if something goes wrong. If we had to repeat the experience, we will increase the number of 'Zoom get togethers.'

Our teachers' technical understanding has definitely increased. Looking ahead, digital learning across all subjects is still linked to our long-term planning. Learning activities that can be monitored and where feedback can be given would be really useful to ensure all children are monitored and their engagement recorded.

We reflected, refined and evaluated our offer from the previous lockdowns and believe we gave our children and families the very best education offer and support we possibly could. Any digital learning resources that could support us with that in a post-pandemic future would be welcomed.



METHODOLOGY

OUP market consultation (February 2021)

As the basis for this report, OUP consulted 47 employee experts from across seven markets where it has operations. These markets were the United Kingdom, Turkey, Spain, South Africa, Brazil, India and Pakistan. All references to ‘respondents’ and ‘spotlight markets’ relate to this consultation. These markets were chosen in recognition of developing a global picture of digital learning over the last year, covering multiple continents and education systems.

The consultation was intended to provide a qualitative insight into the impact of digital learning in these markets. This report also combines research from additional OUP sources, as well as third-party research, to provide a comprehensive picture of the situation.

The breakdown of respondents across all markets is as follows:

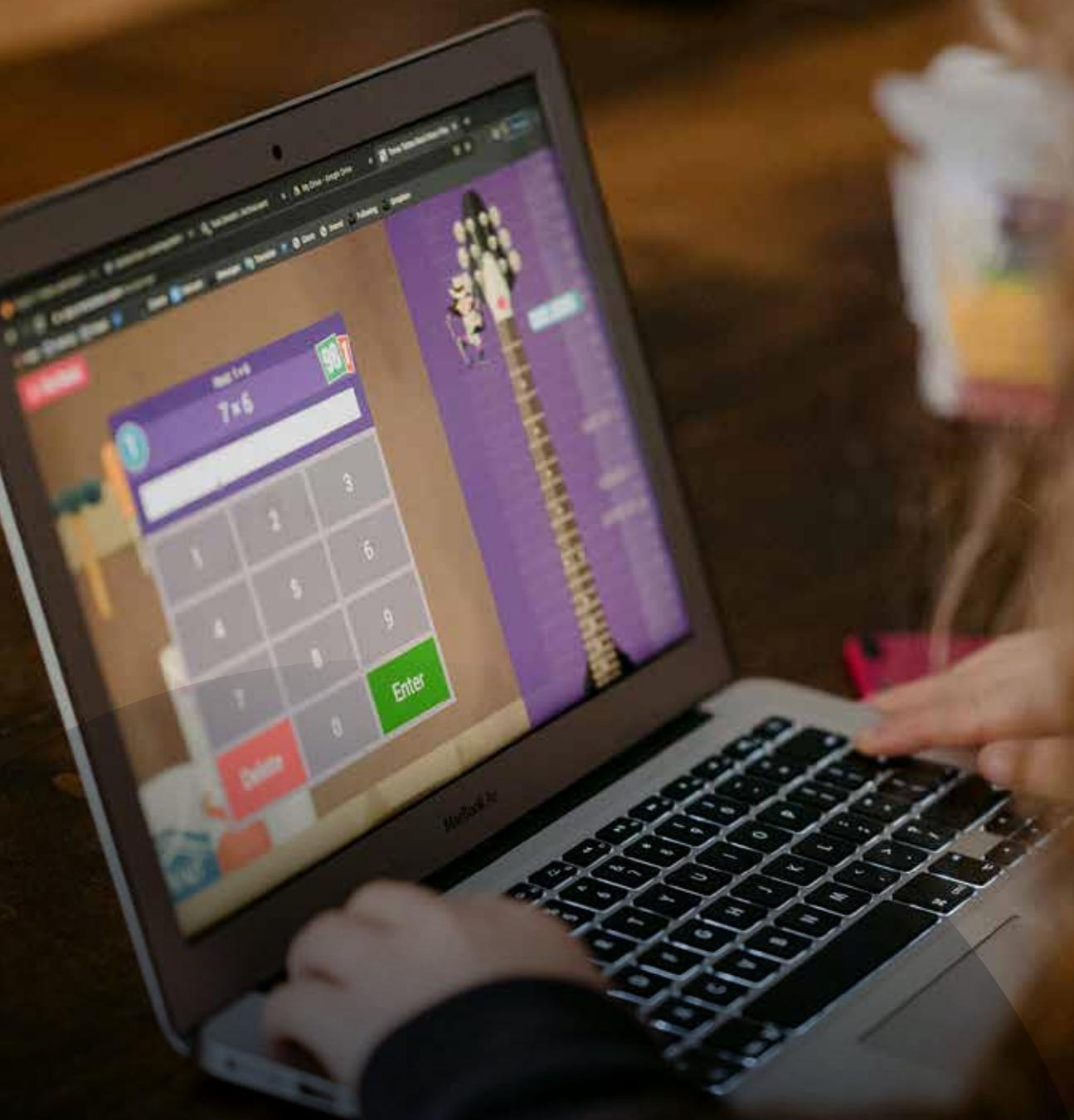


Additional data sources

- OUP teacher panel on digital learning and Covid-19 (22 February–8 March 2021) —359 responses; 283 responses (79 per cent) were from the UK, and 21 per cent were from international teachers.
- OUP ELT poll on government support for digital learning (March 2021)—411 respondents.
- Bridging the Word Gap at Transition: The Oxford Language Report 2020, Oxford University Press (October 2020).
- Impact Study: The impact of promoting student wellbeing on student academic and non-academic outcomes: An analysis of the evidence, Dr Ariel Lindorff, Department of Education, University of Oxford (2020). [Read the study here.](#)

‘The shift to digitization will remain and grow and the pandemic has hastened the creative use of digital in the classroom. Long-term, with increased teacher confidence and openness to digital solutions, I anticipate more innovation.’

Representative from OUP UK



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