



Sanoma Learning

European Teacher Survey 2024

The survey uncovers 5 key findings



The main drivers of learning outcomes

The most important factors for learning outcomes, according to European teachers:

1. Students' intrinsic motivation
2. Coaching and feedback from teachers
3. Access to learning materials.



Strong preference for blended learning

95% of European teachers prefer the use of blended learning materials – i.e. a combination of printed and digital resources. In highly digitalised markets teachers have a stronger appreciation for print.



Most teachers embrace analytics

Most European teachers are positive about the use of analytics to track, compare, and advise on student performance, with some exceptions in Germany, Belgium Wallonia, and Finland.



Significant difference in access to learning materials

There are significant differences between markets when it comes to access to learning materials, and teachers in some areas are clearly dissatisfied with the access provided to their students.

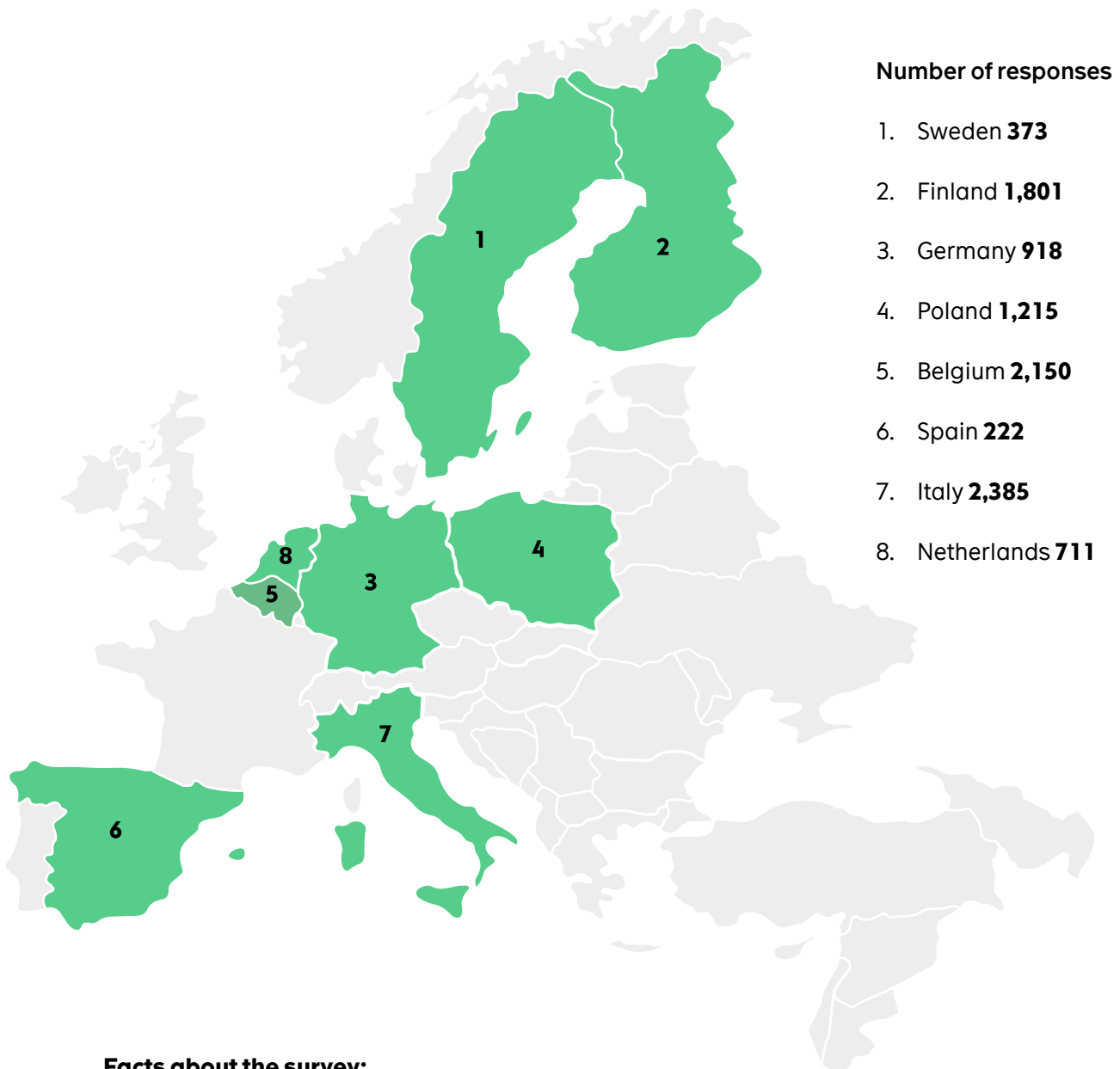


Personalisation

A key for learning outcomes: Over 90% of European teachers agree that personalisation, where the learning environment is tailored to the students' needs and progression, is essential for better learning outcomes.

Our Methodology

Sanoma European Teacher Survey 2024 represents the voice of 9,775 teachers across 8 countries



Facts about the survey:

- Participants: 9,775 teachers in primary and secondary education
- Countries covered in 2024: Finland, Sweden, Netherlands, Belgium (Flanders and Wallonia), Poland, Spain, Italy, Germany
- Annual survey since 2021 (Also conducted 2015-2020 with different methodology)
- The survey is designed by Sanoma Learning
- The research is conducted by GfK, a NIQ company
- This report summarises selected findings of the survey

Drivers of learning outcomes

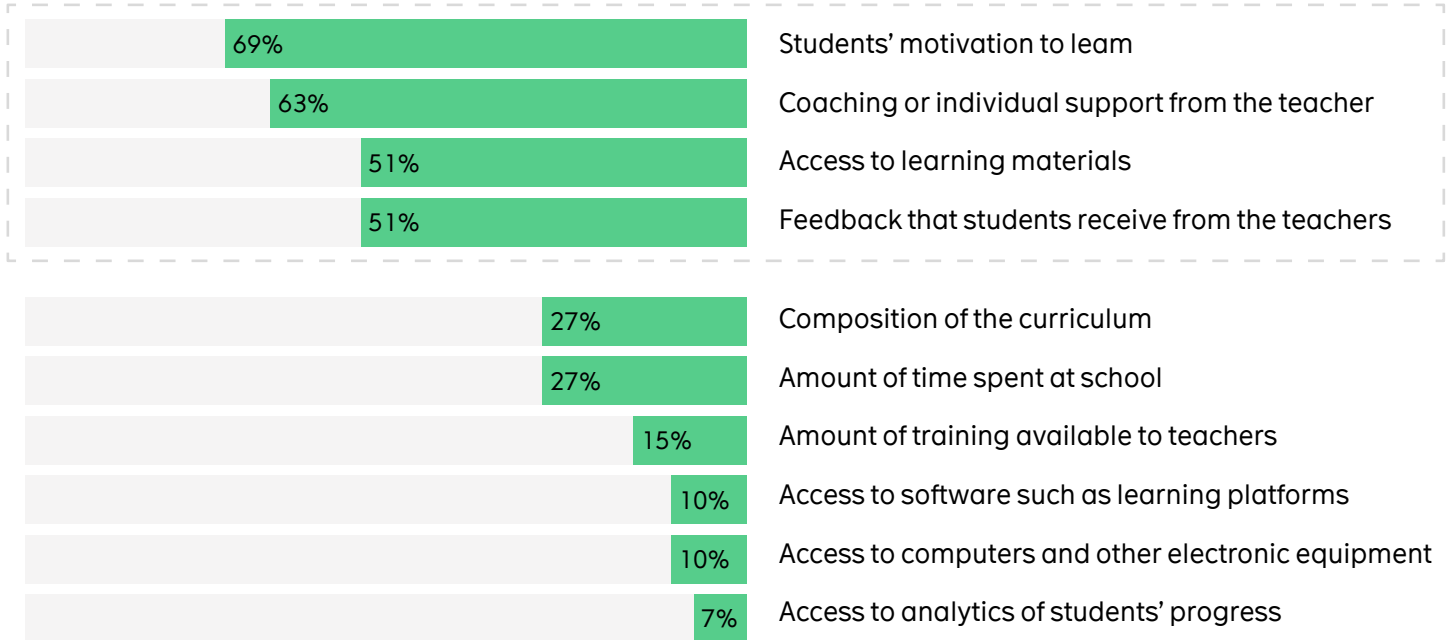
Declining learning outcomes, as reported by PISA, are a concern for many European countries. Nobody is better positioned to understand what can drive learning outcomes than teachers are.

The main drivers of learning outcomes according to European teachers are:

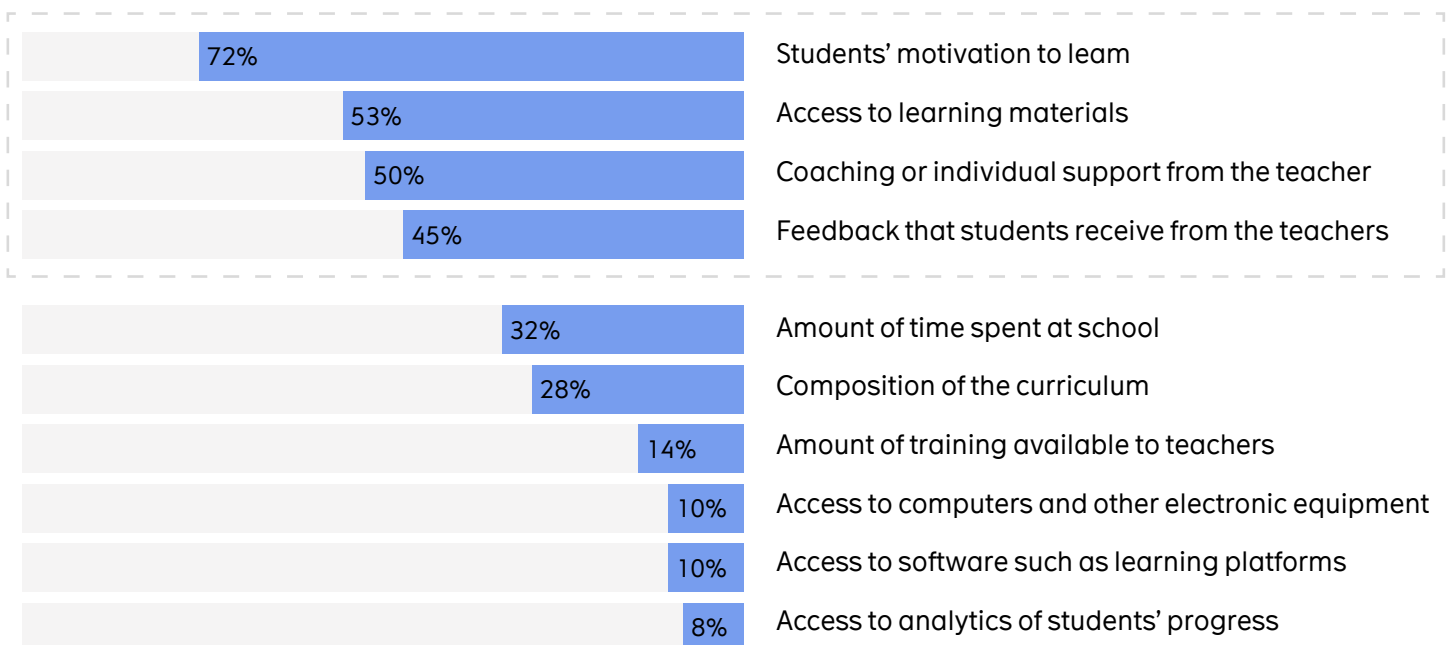
- Students' intrinsic motivation
- Coaching and feedback from teachers
- Access to learning materials

What do teachers consider most effective for achieving good learning outcomes? Here are the percentages of teachers who selected each factor as one of the top three drivers of student success.

Primary Education



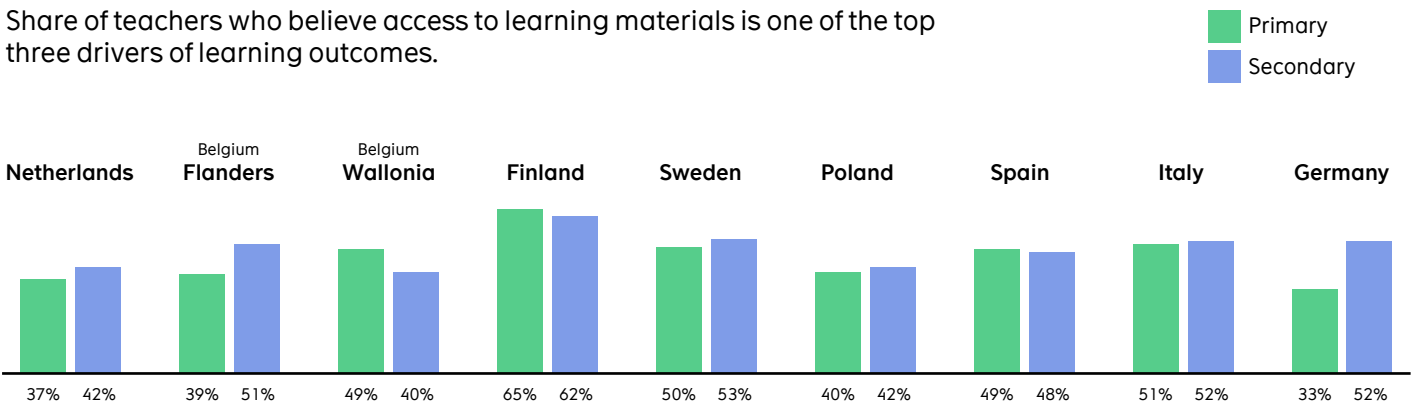
Secondary Education



In Secondary education, teachers rank the access to learning materials as the second most important driver, ahead of coaching and individual support from teachers.

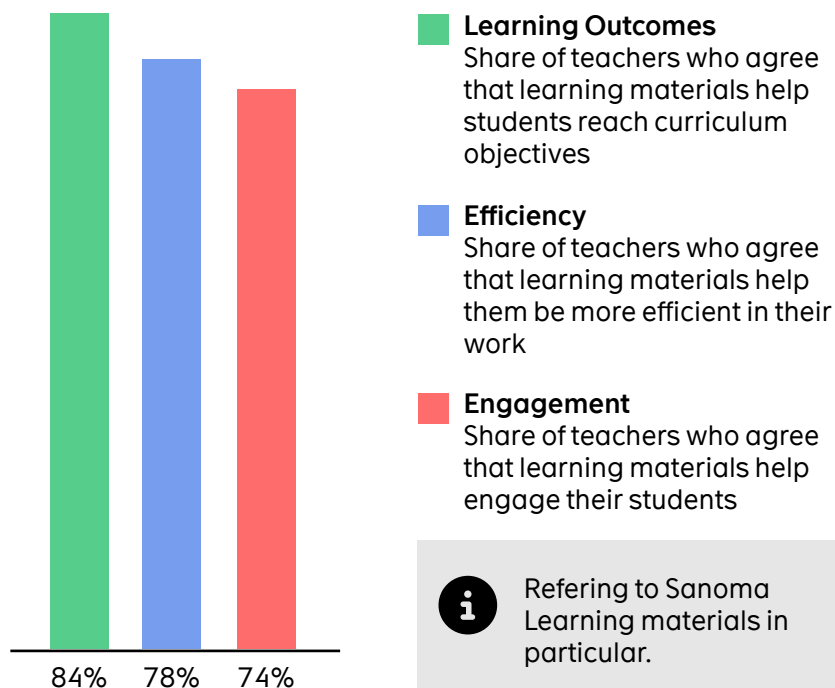
Local variations in how teachers rank the importance of access to learning materials for students' learning outcomes

Share of teachers who believe access to learning materials is one of the top three drivers of learning outcomes.



Appreciation of learning materials is highest in Finland and Sweden; in fact, in Finnish Primary they are seen as the top driver of learning outcomes.

Learning materials help teachers in three key aspects of their work. A significant majority of teachers acknowledge that learning materials help them improve learning outcomes (84%), teacher efficiency (78%) and student engagement (74%).



- Learning Outcomes**
Share of teachers who agree that learning materials help students reach curriculum objectives
- Efficiency**
Share of teachers who agree that learning materials help them be more efficient in their work
- Engagement**
Share of teachers who agree that learning materials help engage their students

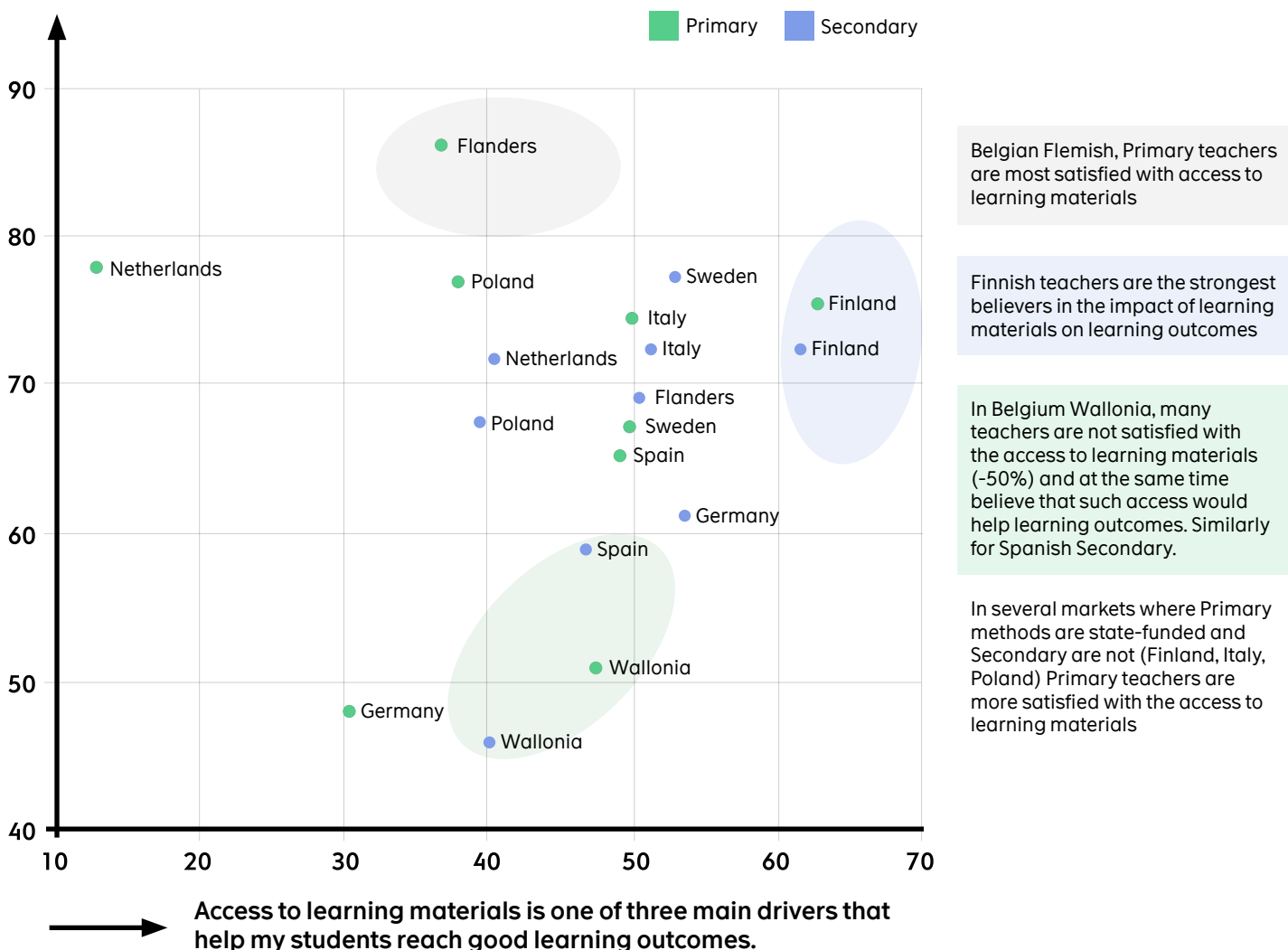


Referring to Sanoma Learning materials in particular.

Challenge with the access to learning materials in some regions

The survey shows a large difference between markets when it comes to students' access to learning materials. Flemish (Belgian) Primary teachers are most satisfied with the access to learning materials. About half of the responding Secondary education teachers in Spain, and half of all responding teachers in southern Belgium (Wallonia) and Germany say they are not satisfied with how accessible learning materials are to students.

I am satisfied with the access to learning materials at my school



- In Spain, secondary learning materials are mostly funded by parents, not by the government or the municipalities.
- In Belgium Wallonia, there is less public funding than e.g. in the neighbouring Belgium Flanders, and teachers' own self-made materials are widely in use as a replacement of the missing learning materials.

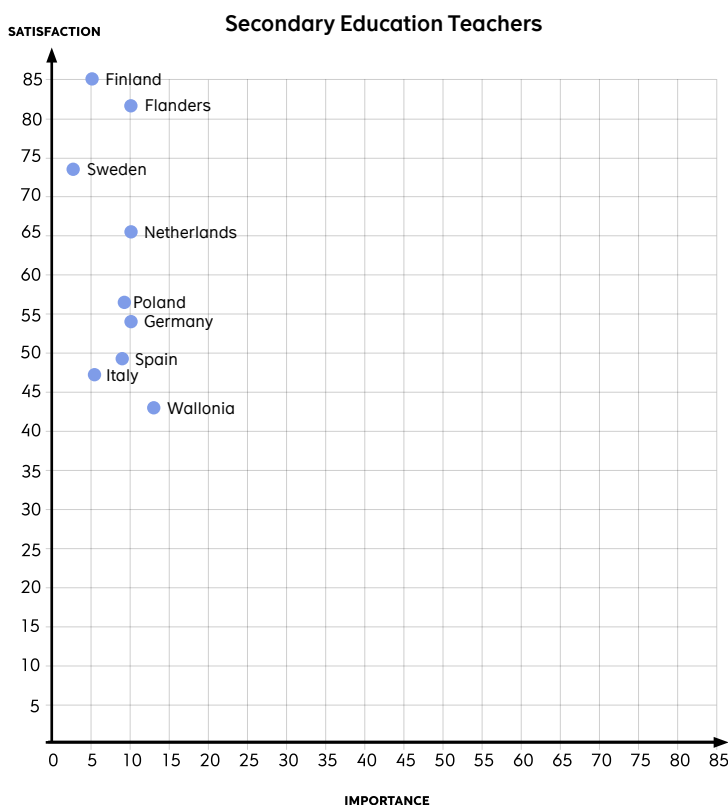
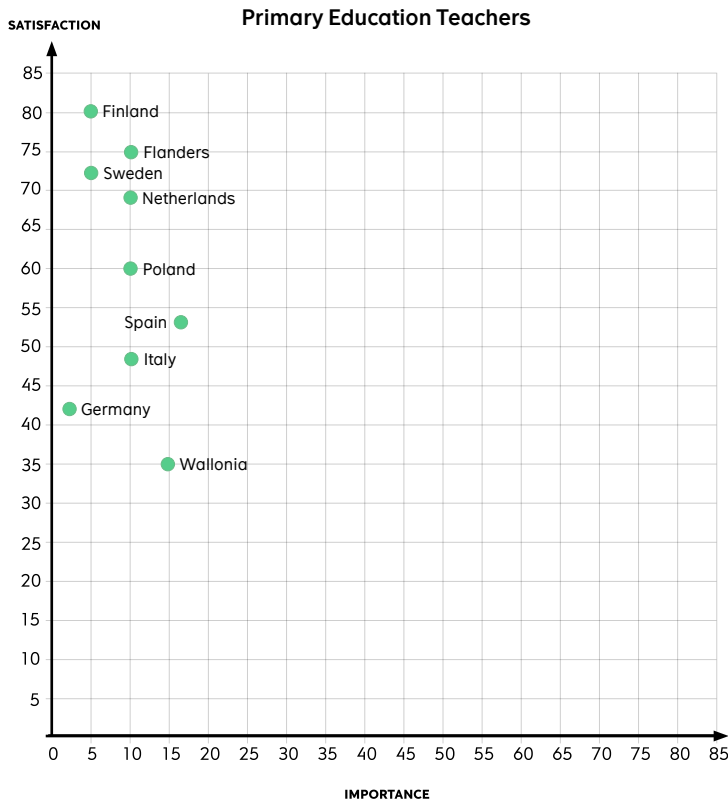


The difference in funding models might play a role for the access of learning materials and could be worth further investigation.

In a situation where PISA scores are declining in almost all European countries, a better access to learning materials could be leveraged as a policy intervention to improve education. This might be an effective measure, given that the European teachers rank the access to learning materials as the only extrinsic top driver for learning outcome. A more structured learning environment might also be a means to counteract what PISA highlights as main reason for declining scores: increased inequalities between students and digital distractions.

Access to computers and other electronic devices is not an important driver of learning outcomes, and is satisfactory in most countries

Teachers' opinion on relative importance of access to computers and other electronic devices for learning outcomes vs. teachers' satisfaction with how accessible these are percentage of teachers by country



Access to hardware is not ranked by teachers among the top drivers for learning outcome. At the same time, in many markets we see considerable investment in hardware driven by digitalisation initiatives, compared to limited investments in updated learning materials and tools for supporting teachers' workflows driven by pedagogical needs.



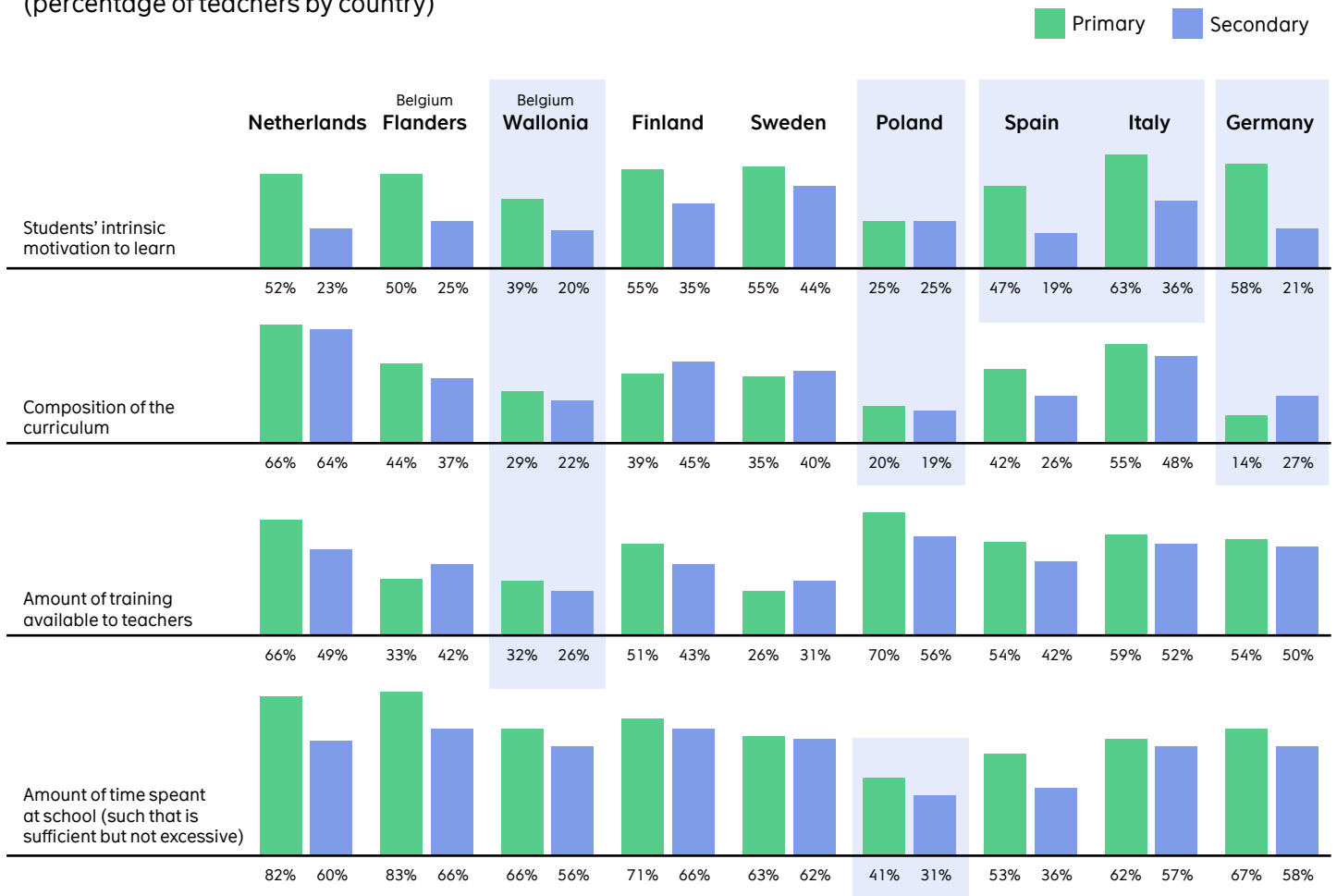
Teachers' work environment

The environment in which teachers work is a complex system, ranging from the regulatory framework of curriculum to tools and physical infrastructure in schools. Which elements are teachers satisfied with and which not?

Many teachers are dissatisfied with how the educational system works

When we look at teachers' satisfaction with key elements of the local educational system, the survey shows big contrasts between European markets.

Teachers' satisfaction with...
(percentage of teachers by country)



Motivation and educational system

- Motivation of students seem to be a critical issue in several countries, especially in Secondary education. Even if the students' motivation is ranked as the top driver for learning, only 31% of Secondary teachers and 55% of Primary teachers are satisfied with the students' motivation to learn. Here we also see large variations between countries.
- 56% of teachers in Poland and 39% of teachers in Germany are dissatisfied with the curriculum, whereas only 12% of Dutch teachers share this sentiment.
- Teachers' satisfaction with the curriculum is highest in The Netherlands, where notably a consensus-based approach is used for curriculum development.
- Most teachers are dissatisfied with several elements of how the educational system works in Belgium Wallonia and in Poland.
- In Belgium Wallonia, curriculum and training seem to be the issues, while in Poland the overloaded curriculum and time spent in school are viewed as problematic.
- Both countries are expected to undergo new reforms which may address these issues
- On the positive side, the amount of training available for teachers is highly regarded in Poland.

Regarding infrastructure and technology, improved access to analytics is the most urgent need identified by teachers. There are also noticeable differences between countries in teachers' satisfaction with infrastructure and technology.

Teachers' satisfaction with...
(percentage of teachers by country)



- General infrastructure is not satisfactory for many teachers especially in Italy, Spain and Sweden's Primary Education.
- Belgian Walloon teachers are largely not satisfied with the access to hardware and software.
- Improved access to analytics seems to be teachers' most urgent need and can help teachers personalise instruction and organise their work better.
 - Teachers in the Netherlands and Belgium Flanders are most satisfied with learning analytics, with Primary teachers in Poland and Spain following.
 - The other markets have lower but differing scores, with the lowest in Germany and Belgium Wallonia



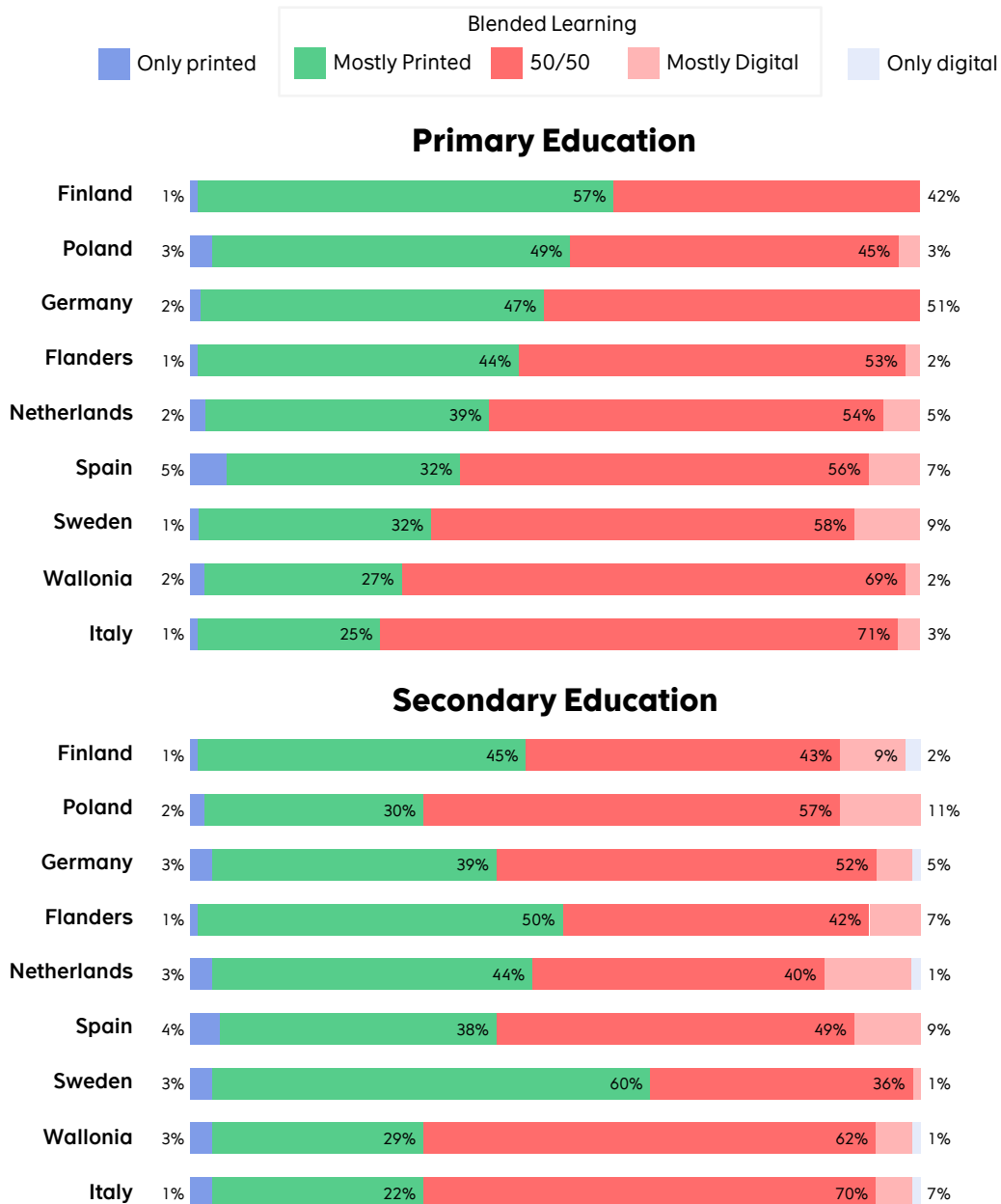
Preferences on content and tools

Zooming in on the tools that teachers use in their work, including learning materials. Which are key? What should be the role of digital and print?

A clear preference for blended learning among teachers

According to the survey, almost all (95%) teachers prefer the use of blended learning materials (i.e. a combination of printed and digital resources).

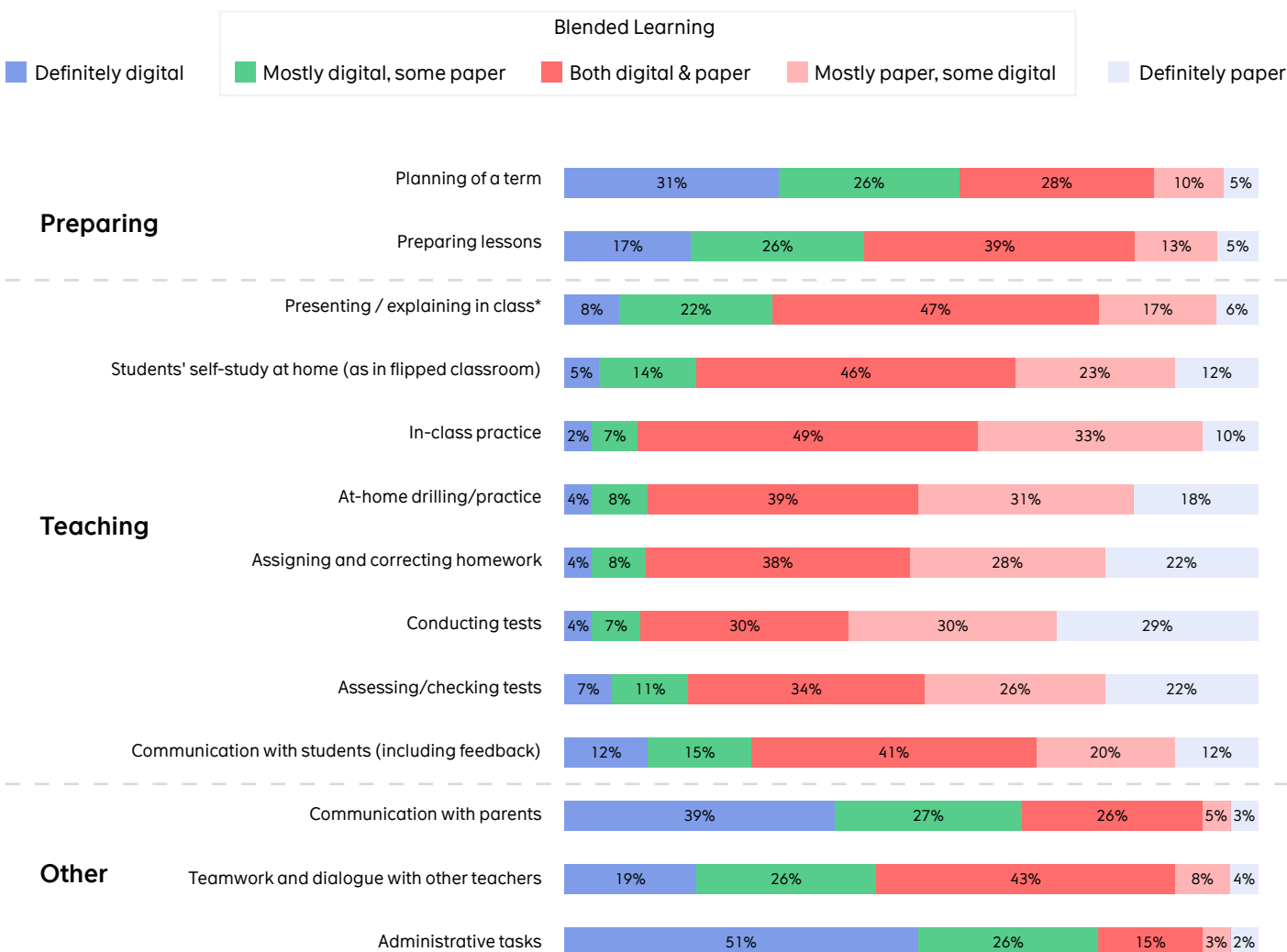
Teachers' opinion on with what kind of learning materials can students reach best learning outcomes (percentage of teachers by country)



- European teachers consider that students can reach the best learning outcomes if they use blended learning materials – mixing digital and print.
- The role of printed materials is most appreciated in digitally advanced markets of Nordics, Netherlands and Belgium Flanders – and, in Polish and German Primary.
- Teachers in markets in early stage of digitalisation (Italy, Belgium Wallonia, Poland, Spain) also prefer the blended model, but appreciate more the digital component within it.
- Comparing with earlier surveys, preferences are shifting towards an increase on printed materials, especially in the Nordics.
- Only in German Secondary does preference for digital increase, likely due to the need to catch up on digitalisation.

In core teaching activities teachers prefer a blended approach; the role of digital is larger in planning, communication and administration.

In the following activities, both digital and traditional (paper-based) tools and content can be used. Which do you think is preferable? (percentage of teachers)



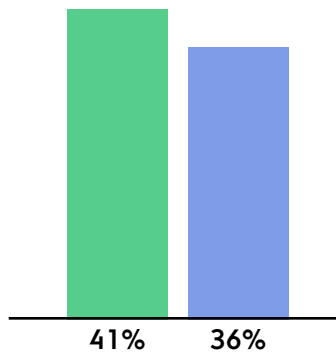
Planning and preparation (85%) and administrative tasks (92%) are highly preferred as digital activities. When it comes to doing presentations and classroom work, most teachers prefer a blended approach to the classroom (85%).

Homework and tests: 73% of teachers prefer a blended approach to assigning and correcting homework. The preference for blended approach is also found in conducting tests (65%) and assessing tests (67%). When it comes to students' self-study at home, the survey also shows the teachers prefer a blended approach (76%).

Communication: Teachers prefer a blended approach to communication with students (70%), including feedback, on digital and paper. For communication with parents 71% of teachers prefer digital communication while only 6% prefer paper or mostly paper for communication.

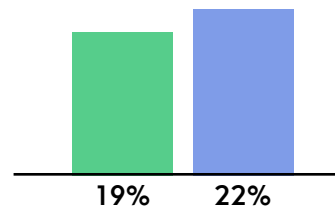
We asked primary and secondary teachers whether they believe the use of video enhances their teaching.

Engage and motivate students



Videos are found to be beneficial as a complement to teaching methods, especially to engage and motivate students.

Provide new content to students



On the other hand, fewer teachers find videos useful to provide the students with new content.

Primary Teachers Secondary Teachers

Looking towards the future

The trends in teachers' preferences towards print or digital are also found in their view on the future of education, answering the question about what should happen to suit the needs of teachers and students 5-10 years in the future:

19%

Learning content should be based **mostly on video**

41%

Learning content should be based **mostly on text and illustrations**

50%

Learning materials should be **mostly printed on paper**

21%

Learning materials should be **all or almost all digital**



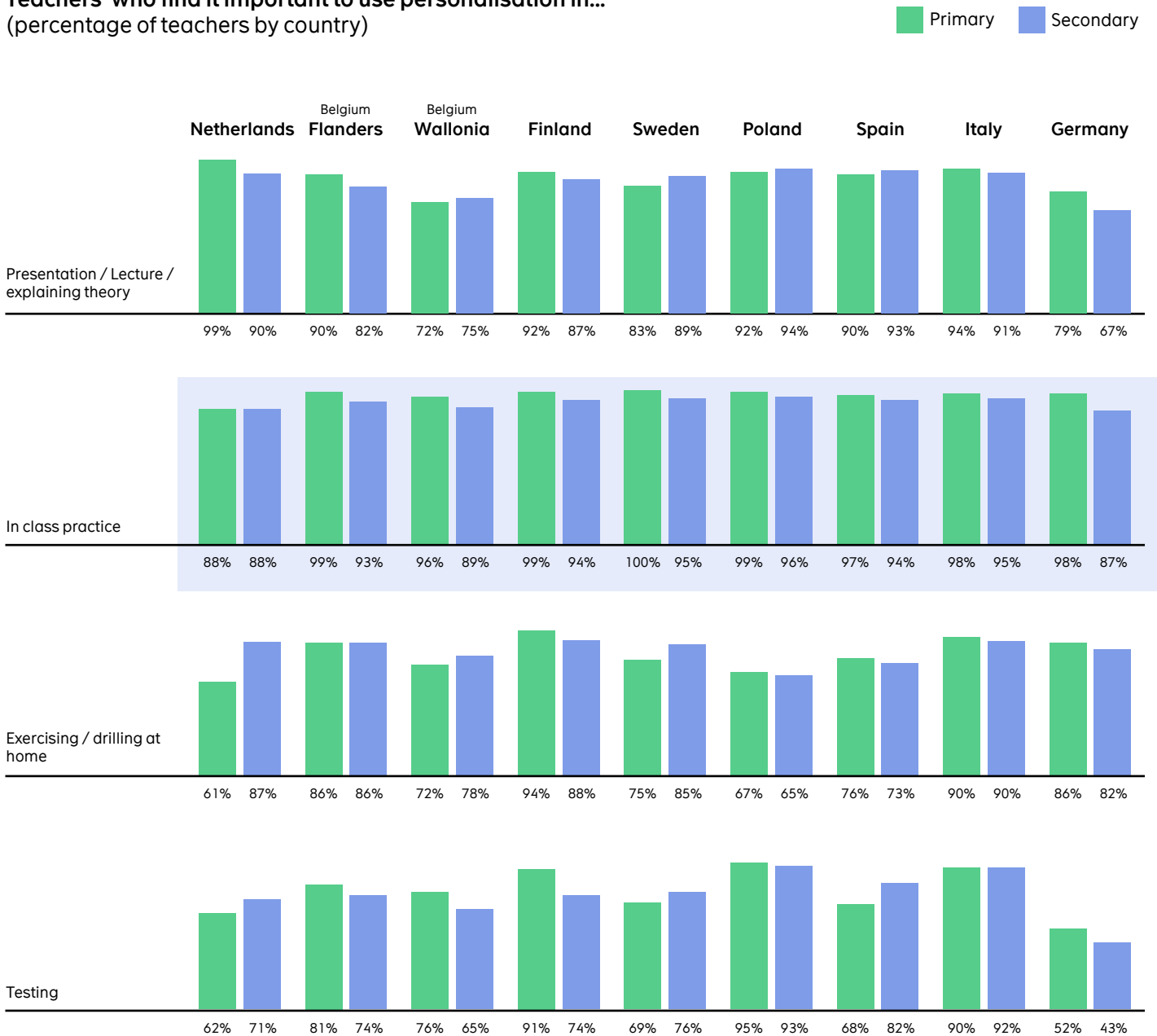
Personalisation and data analytics

In a diverse classroom situation with increased inequalities between students, what are teachers' views on personalisation of learning materials and the use of analytics?

Most teachers consider personalisation to be important across the teaching-learning workflow

Over 90% of teachers agree that personalisation, where the learning content is tailored to the students' need and progression, is essential for better learning outcomes. Even if there is a broad agreement on the importance of differentiated content in learning situations, clear differences exist between markets when it comes to the view on personalisation.

Teachers' who find it important to use personalisation in... (percentage of teachers by country)



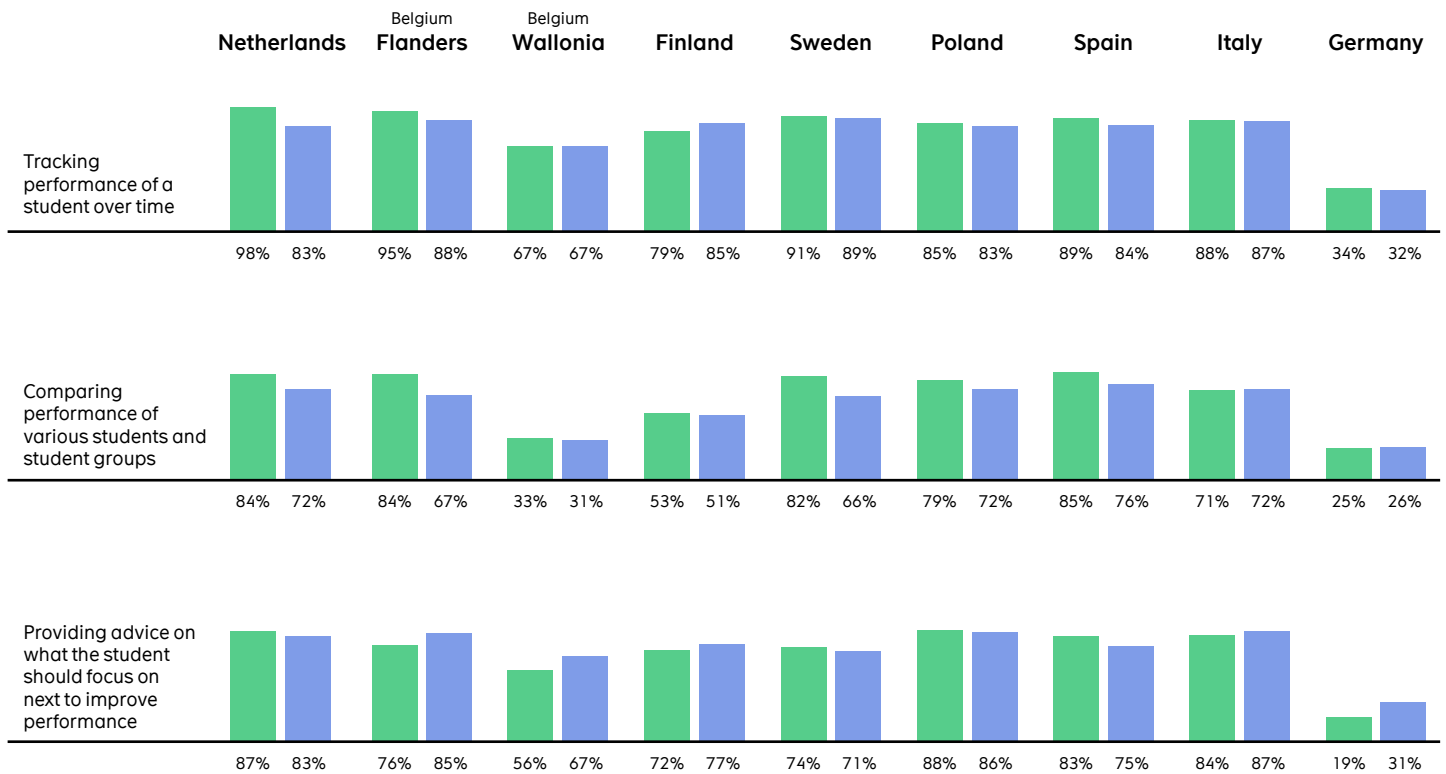
- In-class practice overwhelmingly seen as area where personalisation is key (87-100% teachers agree)
- Some differences between countries regarding personalising presentation, homework and testing – this may be due to differing pedagogical approaches
- Personalisation in testing often seen as relatively less important likely due to the fairness element present even in formative testing

Teachers are highly receptive to using analytics across various use cases

European teachers are, in general, highly receptive to using analytics: for instance, 73% of primary teachers and 70% of secondary teachers are positive about using digital tools in tracking student performance.

Percentage of teachers who would use analytics for...

Primary Secondary



The exceptions, we find among teachers in Germany (28%), Belgium Wallonia (53%) and partly Finland (68% in primary), which are less receptive to the use of analytics. If we consider the teachers' view outside these exceptional markets, 82% of European teachers answer that they would like to use digital analytic tools in their work.

1. Almost all teachers are in favour of using analytics tools for tracking students' performance.

- 98% of Dutch primary teachers are in favour
- In Belgium Flanders 95% are positive and in Sweden 91% positive.
- Clear scepticism in Germany (33%) and significant lower score in Belgium Wallonia (67%) compared to the average of the other markets (87%)

2. Majority (75%) of teachers would use analytics to compare students

Germany, Belgium Wallonia and, to a smaller extent, Finland are less receptive to this use case – the latter even though it is regarded to be one of most highly digitalised markets

3. 85% of teachers would use analytics to provide advice on what to focus on

Most teachers across the European countries are ok with using analytics to provide advice on what to focus on in the teaching and student follow up, with Germany being the only notable exception.

It is likely that new and improved solutions for analytics will be more accessible to teachers in the future, with the help of generative AI capabilities. The question is not about technical limitations, but still about understanding the needs of the teachers and how these tools can support teacher efficiency and improved learning outcomes. The ethical and compliance aspects of the use of AI will play a crucial role in the further development of these tools, which is also high on the agenda for Sanoma Learning.

Contact us

We hope that these main findings from the 2024 Sanoma Learning European Teacher Survey are of interest, and that you have found some valuable insights that could help in understanding the current state and trends expressed by teachers across Europe.

Please reach out if you would like to get in touch for specific questions, more insight in local findings or for potential cooperation with Sanoma Learning to make a positive impact on education.

sanomalearning.com

