The State of Student Success & Engagement in Higher Education

GLOBAL RESEARCH STUDY & TRENDS

INSTRUCTURE | CANVAS

2023

Table of Contents

KEY:

NORAM = North America

EMEA = Europe, the Middle East, & Africa

APAC = Asia Pacific

Global Trends & Insights

01

A New Frontier: Embracing the Global Revolution in Higher Education

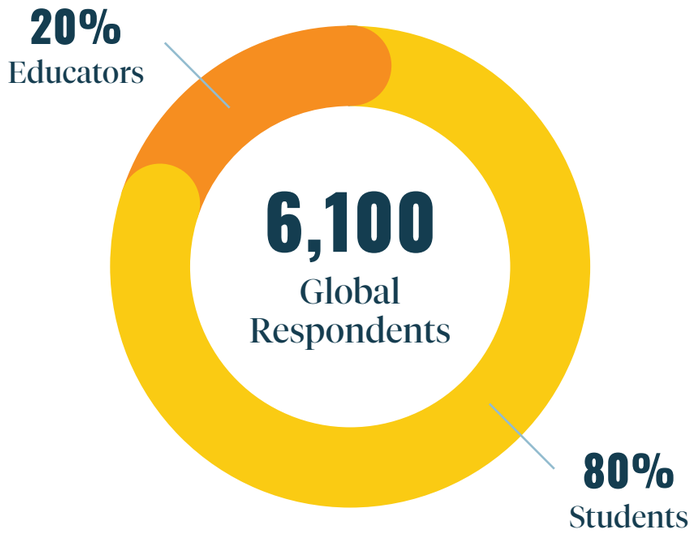
In a world where the demand for workforce skills surpasses the supply, learners across the globe are pursuing education that aligns directly with market needs. Unlike the times when being a student denoted a specific period in a person's life, learning skills for the workforce has become a lifelong journey. People are living and working longer than ever before, making multiple career shifts throughout their lives, and seeking skills-based learning opportunities to support them along the way. The linear education landscape we once knew no longer exists.

In tandem with longer lives, technological enhancements continue to shape what work looks like for every industry and the skills necessary to support that work. Globally, classrooms are adopting education technology to assist educators in preparing students for this new world of work. From education access and delivery, to groundbreaking tools like generative AI, technology is revolutionizing teaching and learning. As institutions embark on the journey of providing accessible, fluid education for lifelong learners, understanding their needs will be imperative for educators.

THIS RESEARCH SEEKS TO SHED LIGHT ON THE PATH AHEAD FOR HIGHER EDUCATION BY ANSWERING THE FOLLOWING QUESTIONS:

- **Are students satisfied with the existing skills-based learning opportunities for lifelong learning?**
- **What tools best support student success and engagement and how can they be leveraged across the education landscape?**
- **With technology being so immersed in the student experience, how can institutions address barriers to access and provide educators with the support they need inside and outside the classroom?**
- **How are faculty across the globe being supported through changes in their industry?**

The 2023 State of Student Success and Engagement in Higher Education shares results from a global study – encapsulating trends and movements within higher education and critical drivers of student success and engagement today.



Instructure worked with Hanover Research to field a survey in 17 countries, asking 6,100 current students, administrators, and faculty from 2-year, 4-year, public, and private higher education institutions for their perspectives on factors impacting student success and engagement.

The Results

Across all regions, student expectations for higher education come down to practical application, accessibility, and convenience. Students want courses that are designed to support personalized needs, on-the-go access, and flexibility. They desire to learn more skills and advance their careers through skills-based learning opportunities, often choosing certificates and apprenticeships to supplement their degrees.

Technology continues to impact how students access education and the workforce. New educational technology and tools like generative AI have quickly been introduced to classrooms across the world, but in various capacities. For example, these tools have yet to be used consistently across institutions, as guidelines and faculty training are still new developments in higher education. While educators have begun using generative AI in their courses, many have concerns about how these tools may impact students.

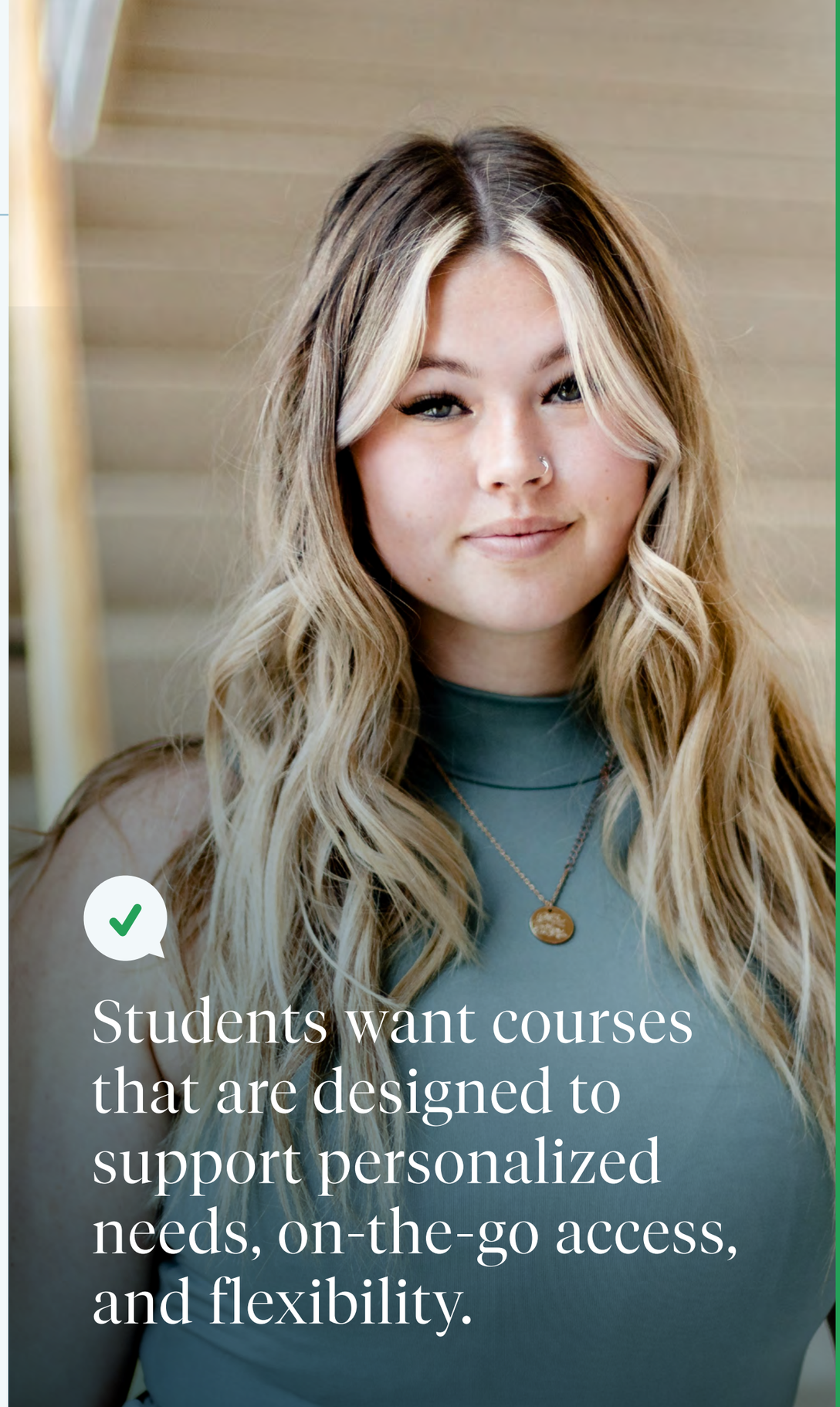
Generative AI tools have yet to be used consistently across institutions, as guidelines and faculty training are still new developments in higher education.

Institutions are embracing more educational technology solutions and addressing factors that could widen the digital equity gap, such as where a student lives and access to technology, which remains one of the biggest roadblocks for many students.

We're constantly adapting to living and learning in a world influenced by technology, making the need for rest increasingly vital. Both educators and students value access to mental health resources, especially in-person and virtual counseling, which are the top mental health resources institutions offer. However, more than resources, students and educators want days off to recharge. Educators, in particular, would like more support from institutions regarding personal and professional development.

As the world experiences expansion in how education is accessed and delivered, the need for ingenuity in higher education will grow. Student success and engagement will hinge on the ability of higher education to meet learners where they are. Institutions will need consistency in embracing and leveraging edtech and AI tools, and offer more comprehensive personal and mental health support for students and educators.

We hope you'll find valuable insights from this year's findings as we embark upon and shape the current revolution in global higher education.



Students want courses that are designed to support personalized needs, on-the-go access, and flexibility.

Six Key Trends

Our study revealed that the six key trends students, administrators, and faculty around the world identified as most important to student success and engagement in 2023 are:

01

Skills-based learning is becoming the most valued for its practical application in the workforce.

As the workforce shifts and more jobs go remote, the need for students to demonstrate proof of skills to potential employers increases. Career advancement and the desire to learn new skills are most likely to influence students to pursue a skills-based learning opportunity, along with cost and program flexibility. Students increasingly desire courses and programs that undoubtedly prepare them for the workforce and expect educators to make more personalized courses, offer hands-on, practical learning opportunities, and support on-the-go learners.

02

Certificates and apprenticeship programs are becoming highly valued by both students and employers for their demonstrable proof of workplace skills, and upskilling/reskilling for lifelong learners.

Longer life expectancy, education costs, and changes in the workplace are driving a fundamental shift toward lifelong learning. As more students seek skills-based learning opportunities to supplement their traditional degrees and ensure return on their educational investment, colleges and universities can adapt their offerings to meet this need. Of the skills-based learning opportunities institutions currently offer for lifelong learning, students are most likely to consider certificates and apprenticeships. Viewed positively by three-quarters of respondents, certificates and apprenticeships can serve as viable vehicles for the practical skills learners need for career readiness and advancement.

03

Schools need to provide consistent guidelines and training around generative AI for educators and students or risk a growing divide in skill development.

While technology played a vital role in getting students and educators through the pandemic, AI has introduced a growing divide in the adoption of tech tools in the classroom. Through guidelines and training for generative AI, colleges and universities have an opportunity to aid educators in driving consistency for learners. Despite the building interest in generative AI, these tools have yet to be used consistently across institutions, with only one-quarter of educators currently using them. The top concerns educators have about using AI in classrooms are cheating/plagiarism and decreased creativity/critical thinking among students – who also use AI for research, writing and test preparation. Instead of hyper-focusing on cheating, educators should shift their focus to new assessment methods and productive uses of generative AI tools. Otherwise, they risk losing tech-native students and an opportunity to prepare them for future jobs that will leverage advanced technology.

04

Access to technology has the greatest impact on student success and engagement, but we haven't solved the accessibility gap for many learners.

One of the silver linings of the pandemic was the increase in accessibility delivered through technology. However, as technology and education evolve, institutions risk widening the gap in accessibility for students with little or no access to technology, edtech tools, and reliable Wi-Fi or broadband connections. Learning management systems are among the most used edtech solutions, which most students and educators say are being used to increase accessibility. Although institutions provide technology equipment to students who cannot access it, offer hybrid learning options, and provide mobile app access to the LMS, accessing technology remains one of the biggest roadblocks for many students.

05

Students and educators value mental health resources, but really want time off.

Psychological well-being and access to mental health resources greatly impact student engagement and faculty support. Many institutions provide mental health resources that can be accessed through LMS integrations and partnerships, but a good portion of students are unaware of or unable to leverage these resources. Today, the top mental health resource offered by institutions is in-person/virtual counseling, but what students and educators want most are personal/mental health days off to recharge.

06

Educators feel most empowered when they are given autonomy, respect, and holistic support.

Today's educators are dealing with bigger classes, more regulation, and demands for greater flexibility from students in how they want to learn. They would like most for their institutions to offer additional personal development, acknowledge/award their achievements, and provide them with opportunities to give feedback. Educators feel most empowered by their institution when they are given autonomy and respect in their position and feel as though their physical and mental health is cared for. Currently, the top professional development opportunities available to educators through institutions are technology training and diversity, equity and inclusion (DEI) training.

Lifelong Learning & Technology

Embracing the Fundamental Shift Toward Lifelong Learning

02

Preparing Students through Skills-Based Learning

Skills-based learning opportunities are designed to teach students specific skills that align with industry needs, are tailored to individual student needs, and attract students for multiple reasons.

Career advancement (61%) and the desire to learn new skills (61%) are most likely to influence students to pursue a skills-based learning opportunity, along with cost (52%) and program flexibility (48%). Both students and educators value a variety of aspects of skills-based learning opportunities, such as the practical application of topics (75%) and progress/ performance feedback (67%).

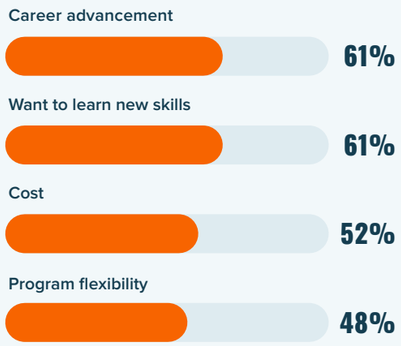
Between educators and students, educators are significantly more likely to strongly value the practical application of knowledge and skills (78%) and integration of technology (72%) compared to students (74%, 61%, respectively).

Of the factors that would most influence students to pursue a skills-based learning opportunity, cost is significantly more likely to be influential to students in North America (NORAM, 61%) than to students in Europe, the Middle East & Africa (EMEA, 48%) and the Asia Pacific (APAC, 41%).

In APAC (66%), the desire to learn new skills is more likely to impact a student's pursuit of skills-based opportunities than in NORAM (62%) and EMEA (57%).

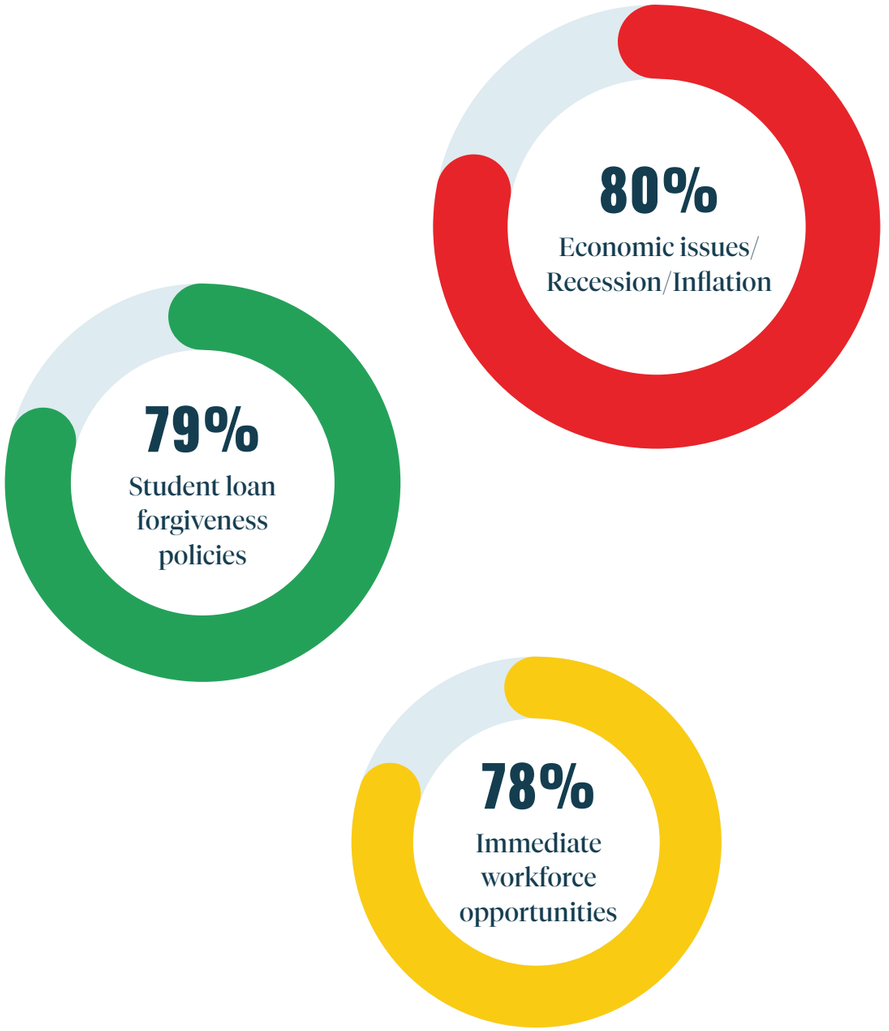
MOST VALUABLE ASPECTS OF SKILLS-BASED LEARNING

MOST INFLUENTIAL FACTORS TO PURSUE A SKILLS-BASED LEARNING OPPORTUNITY



Learners are being more intentional about preparing for their careers, but the workforce is one of several factors impacting student enrollment today. Overall, economic issues (80%) and immediate workforce opportunities (78%) are the most impactful outside factors on student enrollment.

MOST IMPACTFUL OUTSIDE FACTORS ON STUDENT ENROLLMENT



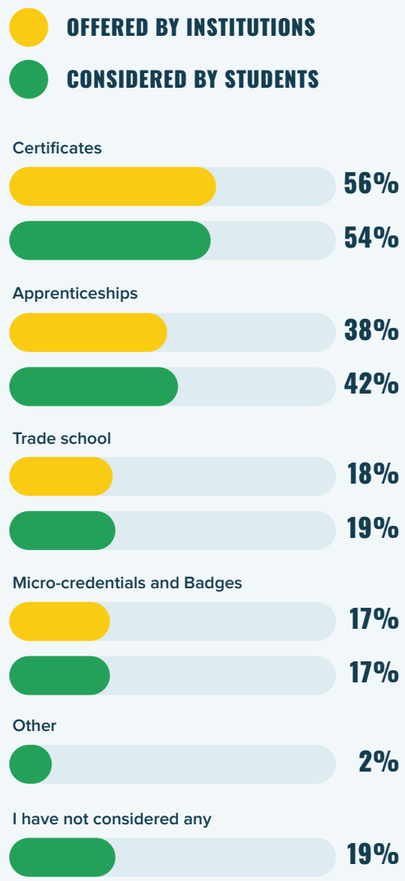
Evaluating Paths for Lifelong Learning

With longer lives and longer careers, students can pursue skills-based learning opportunities beyond their college years. They can consider certificates, apprenticeships, trade school, micro-credentials and badges, and other avenues for skill-building. However, two options stand out above the rest: certificates and apprenticeships.

Certificates (56%) and apprenticeships (38%) are the skills-based learning opportunities students are most likely to go after for career advancement.

While these alternative programs rise to the top, a number of students do not know about them. Educators (62%) are significantly more likely than students (55%) to say their institution offers certificates. In comparison, students (19%) are significantly more likely to say they are unsure what skills-based learning opportunities their institution offers compared to educators (6%).

SKILLS-BASED LEARNING OPPORTUNITIES



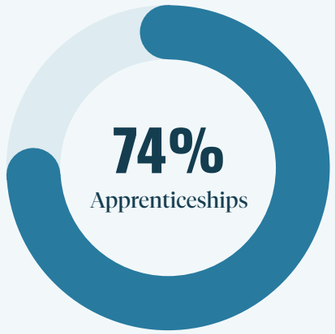
CERTIFICATES AND APPRENTICESHIPS BY REGION:

- **NORAM students (58%) are significantly more likely than EMEA (51%) and APAC (53%) students to say they have considered certificates.**
- **EMEA students (54%) are significantly more likely than NORAM (35%) and APAC (35%) students to say they have considered apprenticeships.**
- **APAC students (25%) are significantly more likely to say they have not considered any skills-based learning compared to NORAM (20%) and EMEA (15%) students.**

Across all regions, most respondents have a positive impression of certificate (74%) and apprenticeship (74%) programs. Educators are significantly more likely than students to have a positive impression of all skills-based learning opportunities, including apprenticeships (80% vs. 73% of students) and certificates (78% vs. 73% of students).

The preference for one program or the other is primarily influenced by where students live, suggesting that both certificates and apprenticeships are comparable options for skills-based learning.

RESPONDENTS WITH A POSITIVE PERCEPTION OF SKILLS-BASED LEARNING OPPORTUNITIES



WHAT EDUCATORS THINK:

The rise of skills-based learning has forced courses to become more flexible and personalized and include more hands-on, practical applications.

A skills-based learning approach in education and technology encourages open learning and advances the development of new skills as careers progress.

— EMEA EDUCATOR

Skills-based learning has major effects because it aims the students to become 21st-century learners and globally competitive.

— APAC EDUCATOR

Courses are more hands-on now as skills-based learning is more valued in the job market for higher-paying positions.

— NORAM EDUCATOR

Our Perspective

In previous years, skills-based learning became more prominent in higher education, but today it is essential for meeting student and workforce needs. Workers are no longer expected to adapt and learn new skills in a linear fashion, but independently as their roles in the workforce evolve.[1] Higher education institutions worldwide are shifting and extending their offerings to support students in continuous learning.

The avenues for career advancement that have long existed, like certificates and apprenticeships, are still highly regarded by students and employers and can serve as viable vehicles for reskilling and upskilling. The question remains whether these programs will be sustainable as they are, or if institutions will need to move with more ingenuity to adapt their offerings and keep pace with students today.

CONSIDERATIONS:

- **Implement skills-based education that provides students with experiential learning opportunities that align directly with industry needs.**
- **Create courses and programs that provide personalized learning, progress/performance feedback and flexibility. Consider the cost, convenience, and visibility of these opportunities for students.**
- **Ensure students and potential students know of the skills-based learning opportunities available, emphasizing the value of verifiable skills and credentials that can be showcased throughout one's career.**
- **Prioritize certificates and apprenticeships for skills-based learning, identifying ways to adapt these programs for upskilling and reskilling.**

[1] Future-Proof Job Skills: What Employees Need to Know, Harvard Extension School

My institution now offers a wider array of skill-based learning programs, partnering with actual employers for employment opportunities right after completion.

— NORAM EDUCATOR

Navigating the Evolution of Technology & Generative AI in Education

Rapid technological advancements continue to shape higher education, with new developments like generative AI and ChatGPT reaching classrooms worldwide. While most students and educators know how to use generative AI, these tools have yet to be widely used in courses.

Educators use generative AI tools for personalized learning (46%), creating lesson plans/outlines (45%), and research and writing (45%) in their courses, while students commonly use AI for research and writing (66%) and test preparation (54%).

USAGE

One-quarter of students (28%) say they currently use generative AI for courses, while more than one-third (38%) know how to use these tools – but do not currently use them.

GUIDELINES

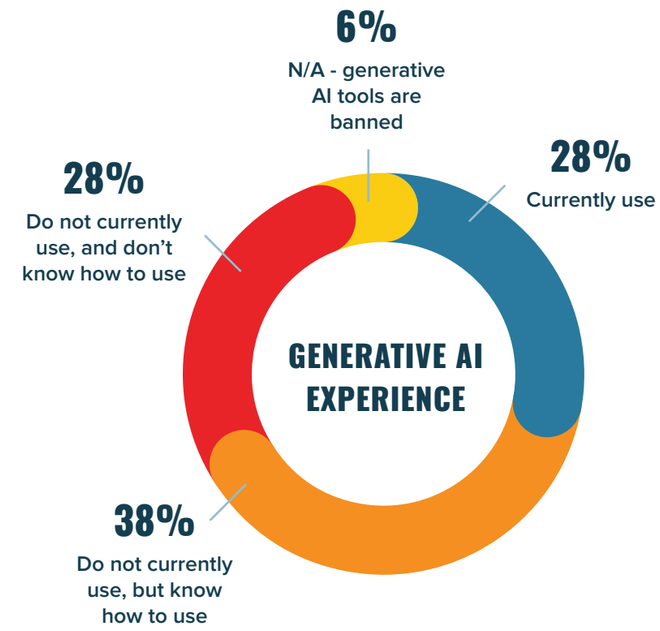
Results are similar for guidelines, as only one-quarter of institutions (27%) have strict guidelines and more than one-third (39%) of institutions only provide light guidelines on use of generative AI.

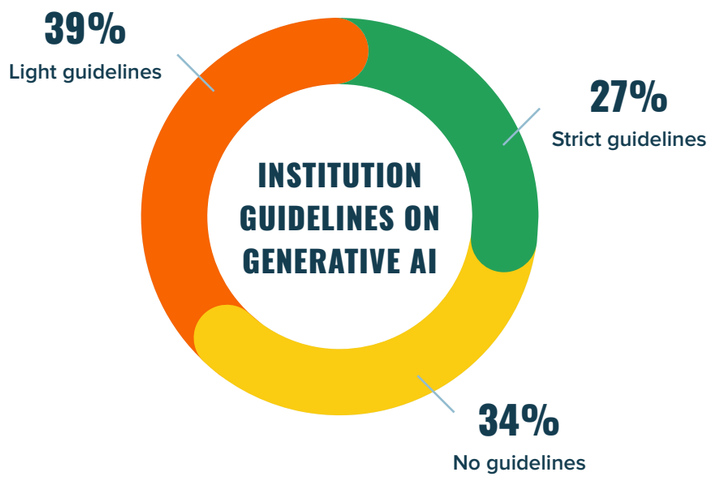
TRAINING

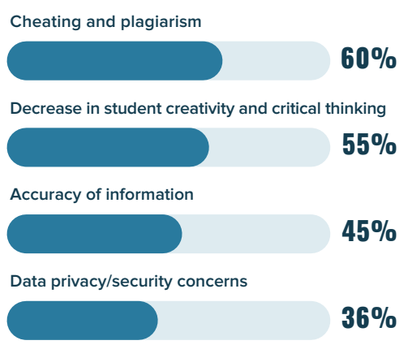
In terms of training, nearly one-third of institutions offer video training (30%) or step-by-step tutorials (29%) on generative AI, however, one-third (31%) do not offer any training.

CONCERNS

Educators have concerns about AI in classrooms, particularly about cheating/plagiarism (60%) and decreased creativity/ critical thinking (55%).







In addition to AI tools, a variety of technology is utilized in the classroom and contributes to student success. Most believe available technology (85%), student (83%) and teacher (81%) use of technology, and technology training resources (80%) strongly impact student success. However, the cost of technology (46%) and infrastructure (38%) are roadblocks many students face when accessing and using edtech solutions or accessing education in general.

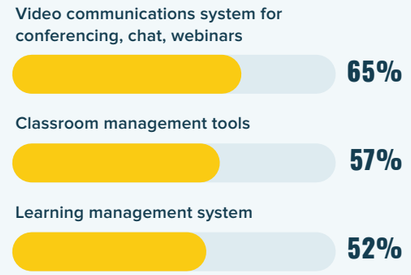
For example, textbooks aren't the only supplies students need for college. According to the National Association of College Stores, course materials (such as textbooks) made up 24% of the total cost of books and supplies, whereas technology made up 59% of their total books and supplies budget.[2] Furthermore, technology infrastructure—the hardware, software, networks, and facilities necessary to operate and manage IT services—directly impacts a student's ability to access online education.

Learning management systems have been successful at supporting engagement and success, as more than three-quarters (78%) say that their LMS has positively impacted engagement in classes and lectures.

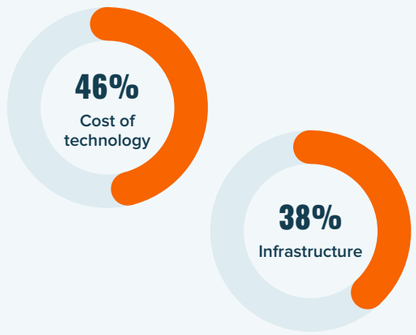
Nearly half of students say they frequently use the mobile app to access their institution's LMS, and are significantly more likely to say their LMS mobile app is used to support engagement and success (50%) than educators (41%).

[2] Average Cost of College Textbooks: Full Statistics, Best Colleges

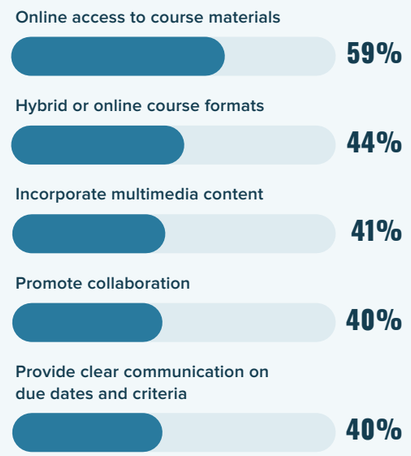
EDTECH SOLUTIONS USED TO HELP STUDENT SUCCESS AND ENGAGEMENT



MAIN ROADBLOCKS TO STUDENTS ACCESSING ED TECH SOLUTIONS



HOW COURSES ARE DESIGNED TO SUPPORT ON-THE-GO LEARNERS



Across all regions, more than half of students (55%) rely on free resources to supplement their learning/curriculum.

Our Perspective

Educational technology has become a mainstay of higher education, introducing new ways to teach and learn every day. Whether in person, online, or through unexpected events, technology plays a vital role in how students access and engage in education.

Generative AI tools have introduced a growing divide in the adoption of tech tools as educators wrestle with how to respond to this emerging technology. For example, ChatGPT is one of the fastest-ever applications ever adopted overall.[3] Driving consistency with how institutions and educators use these tools will help address fear around integrating them into education. These tools can streamline administrative or time-consuming tasks, allowing educators to enhance student learning experiences and focus on teaching and learning.

Consistency should be provided across various facets of the education landscape, from guidelines and training regarding proper usage to how those tools are brought into everyday teaching and learning. Much like the invention of the calculator, AI is yet another tool to aid in building – not replacing – fundamental skills. With generative AI tools evolving so rapidly, higher education has a responsibility to inform how it's leveraged for student success and engagement.

CONSIDERATIONS:

- **Evaluate how students and educators leverage generative AI and edtech solutions within your institution to gauge the gaps and opportunities.**
- **Establish standard guidelines for how generative AI tools should be used by students and educators, allowing flexibility and ingenuity where necessary.**
- **Become a student of these new tools, exploring multiple ways to train educators on using generative AI tools and bringing in subject matter experts to educate and assist.**
- **Keep the lines of communication open between educators and students regarding their concerns and challenges to stay abreast of opportunities to save them time or reduce workload.**

[3] AI Will Transform Teaching and Learning. Let's Get it Right., Stanford University

> I'm looking at AI to present to leadership the overall state of things. We need to be ready for this—this is one of those defining moments we'll remember the before and after.
>
> — CANVAS LMS USER

Access & Support

03

Addressing Accessibility & the Digital Equity Gap

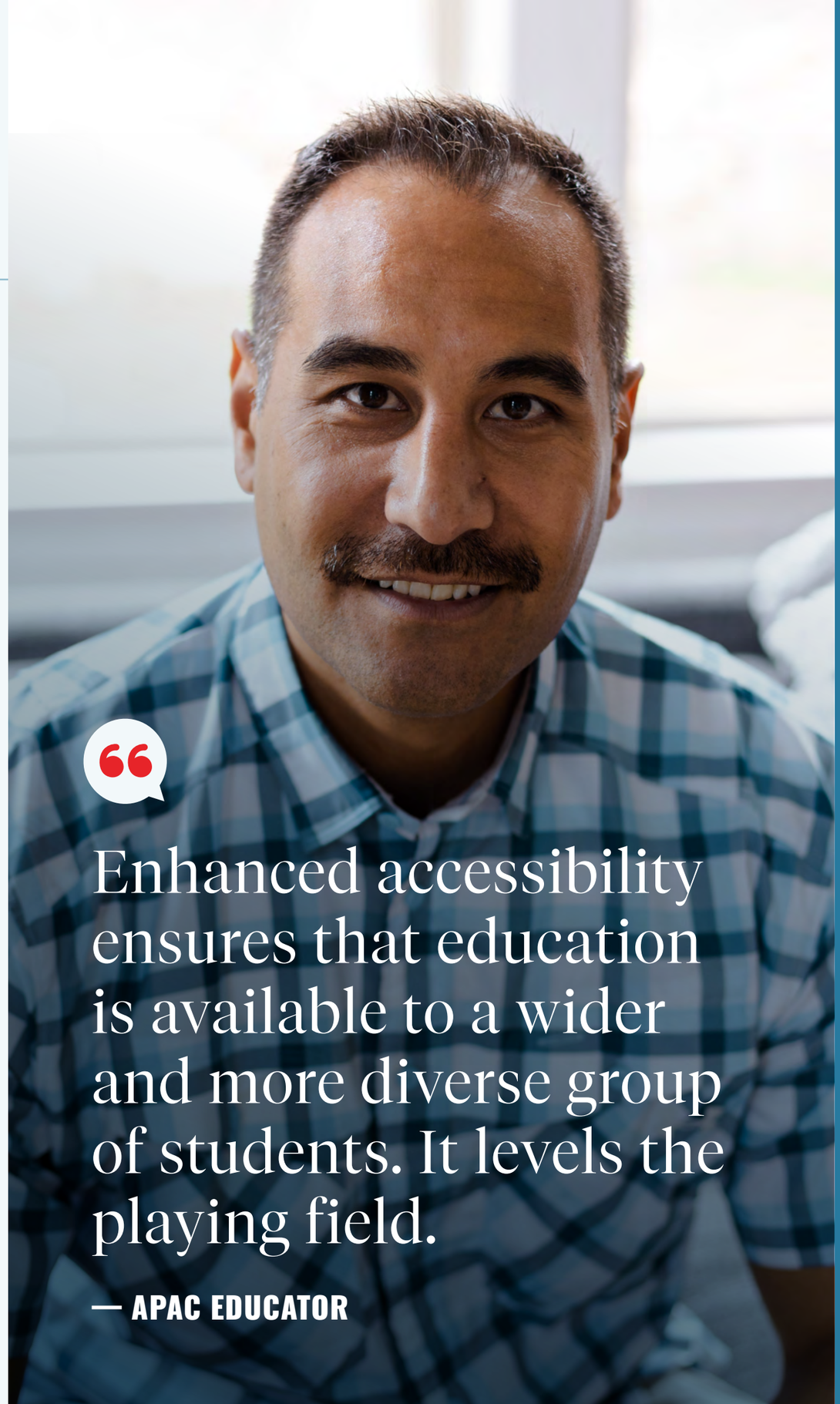
Institutions have taken actions to increase accessibility, specifically through physical improvement and technology expansion.

Three-quarters of respondents (75%) say their LMS is being used to increase accessibility by providing course materials and support resources; however, many students and educators (55%) frequently rely on free resources to supplement their learning/curriculum. Between students and educators, students (56%) are significantly more likely to rely on free resources than educators (48%).

Using more technology in the classroom requires ongoing training and support for the educators who champion these tools. To help increase digital literacy among educators, institutions commonly offer online courses/tutorials (50%) and technology training sessions (48%).

INSTITUTIONS ARE:

- **Ensuring classrooms and buildings are physically accessible (56%)**
- **Using ed tech solutions (46%)**
- **Providing technology equipment to students who cannot access it (45%)**
- **Offering hybrid learning options (43%)**



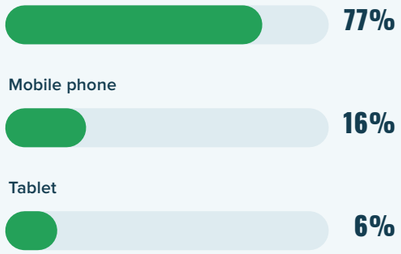
Technology has also helped increase access to education in locations without access to learning resources. A learning desert can be defined as a place with limited or no access to education opportunities due to geographic constraints (e.g., proximity of education institutions, inability to travel away from home). While learning deserts still exist, the increased use of technology in education has helped to decrease their existence.

Half of students and educators (51%) do not believe they live in a learning desert, while one-quarter (27%) agree they do live in one. Furthermore, half (51%) believe that the increased use of technology in education has helped to decrease the existence of these learning deserts.

Students primarily access their institution's LMS through laptop/desktop computers, but a significant portion of students access the LMS via mobile devices.

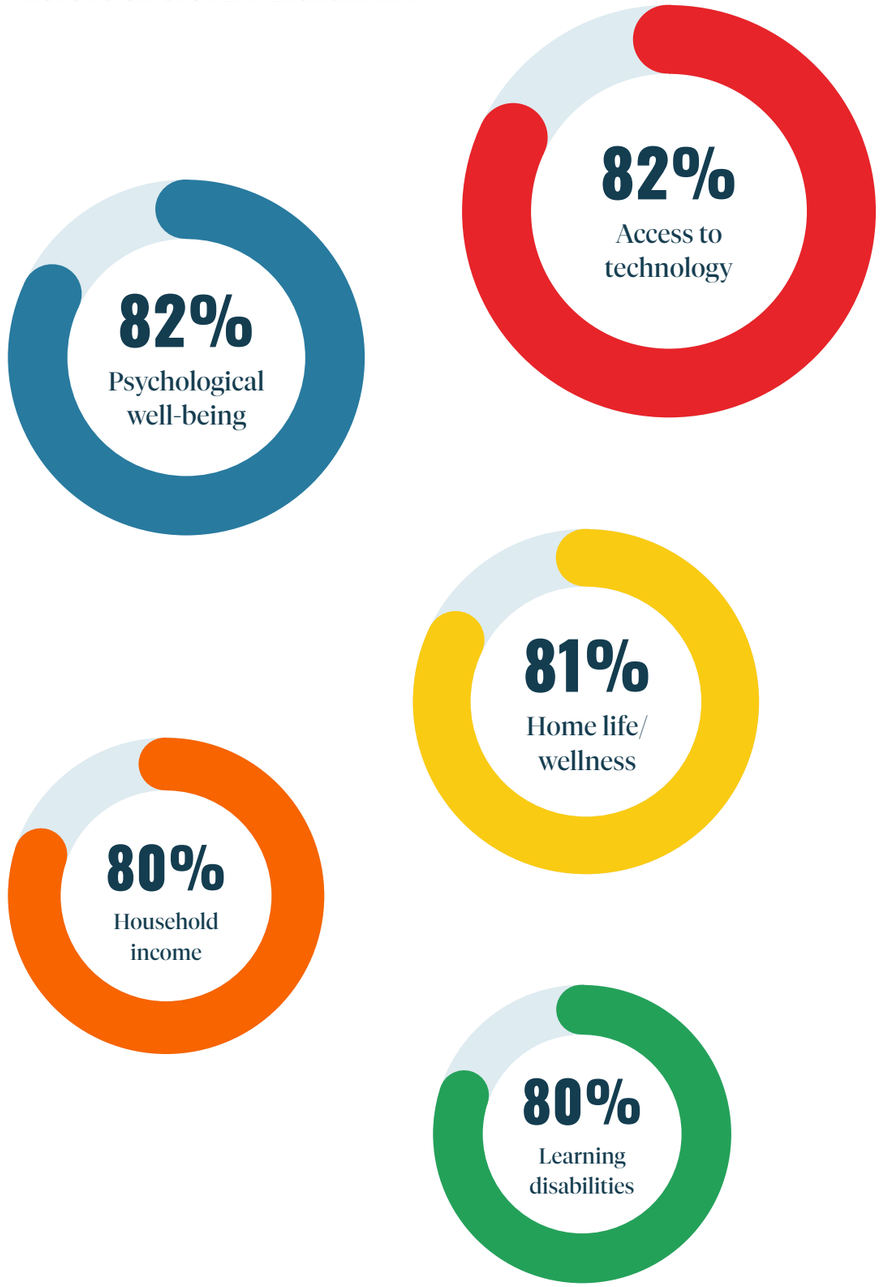
Moreover, nearly half of students (48%) say they frequently use the mobile app to access their institution's LMS, compared to educators (41%).

MOST COMMON METHOD OF ACCESSING LMS



More than physical location, students and educators believe many socioeconomic factors, such as access to technology (82%), psychological well-being (82%), and home/life wellness (81%), have a substantial impact on student engagement.

IMPACT OF SOCIOECONOMIC FACTORS ON STUDENT ENGAGEMENT



Our Perspective

Online learning has helped to bridge the gap between learners and education, especially in recent years. Institutions are providing more courses and programs that can be taken 100% online or in a hybrid format and the technology necessary to access these programs. However, digital equity is still a concern for students who cannot use these tools as intended.[4] Unreliable technology is stressful and causes tangible impacts on coursework for students.[5]

Providing mobile access to coursework and programs can make a world of difference in how many students gain access to education and stay engaged throughout their journeys.

With so many students facing challenges with gaining access to technology, edtech tools, and reliable Wi-Fi or broadband connections, institutions must work toward a more comprehensive approach to closing the digital equity gap.

CONSIDERATIONS:

- **Evaluate the physical and digital constraints students may encounter throughout the student experience, ensuring all online coursework and resources comply with accessibility standards.**
- **Minimize roadblocks for students who may need more access to learning, technology, and reliable broadband connections. Consider socioeconomic factors that may impact education access for potential students.**
- **Build flexible programs that meet students where they are by offering courses and programs that can be self-paced or taken in multiple modalities.**
- **Provide mobile access to the learning management system to help students and educators stay connected and engaged.**

[4] Understanding the Digital Equity Gap and Bridging the Digital Divide in Higher Ed, EdTech Magazine

[5] Flexibility and Equity for Student Success, EDUCAUSE QuickPoll Results

WHAT EDUCATORS THINK:

Increased accessibility impacts student success.

The more tools, resources, information available to students the more they can learn, flourish and enhance their learning skills. Not only them but us as professors are looking to provide new and appropriate material all the time so it affects everyone.

— EMEA EDUCATOR

Increased accessibility in education creates a more inclusive, supportive, and diverse learning environment that fosters student success by addressing individual needs, promoting engagement, and preparing students for meaningful careers and lifelong learning.

— APAC EDUCATOR

Accessibility is the key to student success. Any time we can eliminate potential barriers that students might face in their education, we are making it easier for students to succeed and genuinely learn.

— NORAM EDUCATOR

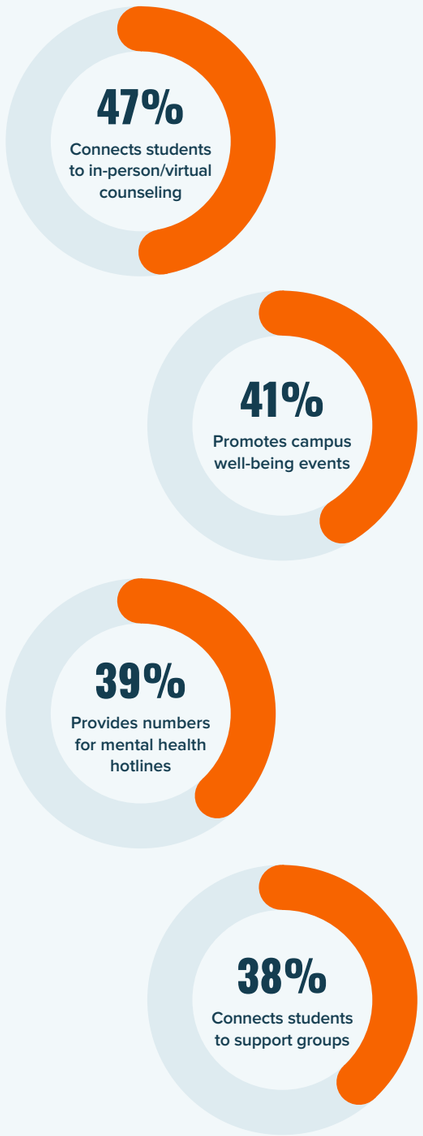
Broadening Support for Student and Educator Well-being

In higher education across the world, the need for more expansive resources for mental and personal well-being continues to grow. Institutions currently offer in-person/virtual counseling (54%), campus well-being events (45%), and mental health hotlines (41%) to support mental health and well-being and often provide these resources through LMS integrations or partnerships.

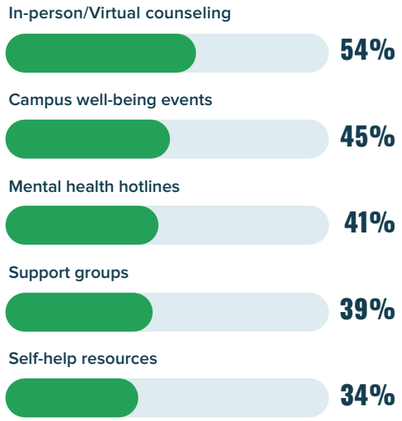
Students and educators can use their LMS to access mental health resources like counseling (47%) and campus well-being events (41%). Though valuable to students and educators, personal/mental health days off (40%) are the most desired mental health resource from institutions that do not currently offer it.

Students are significantly more likely to say they want their institution to offer personal/mental health days off (42%) and mental health apps (30%) as a resource compared to educators (31%; 23%), but both desire time off above all else.

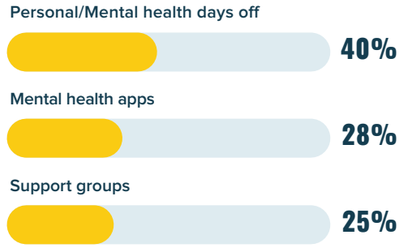
USE OF LMS TO PROVIDE ACCESS TO MENTAL HEALTH RESOURCES



MENTAL HEALTH AND WELL-BEING RESOURCES OFFERED



MENTAL HEALTH AND WELL-BEING RESOURCES DESIRED THAT ARE NOT OFFERED



WHAT EDUCATORS THINK:

Educators believe social media, economic insecurity, and navigating personal relationships can be harmful external factors to student mental health.

> Not being accompanied through learning is the most harmful factor to student mental health.
>
> — EMEA EDUCATOR

> Cost of living and fees drag students down.
>
> — APAC EDUCATOR

> Economic insecurity is a harmful factor to student mental health. It's hard to learn when they are worried about survival.
>
> — NORAM EDUCATOR

As for educators, institutions have the opportunity to support and empower them in new ways. Fewer than half of educators (41%) feel highly empowered by their institution.

EDUCATORS SAY:

- **Their institution can offer more personal development/training opportunities (45%) and acknowledge/award achievements (43%) to better support and empower them.**
- **They feel empowered by their institution when they are given autonomy and respect in their position and feel as though their physical and mental health is cared for.**

Currently, the top professional development opportunities offered to educators by institutions are technology training (52%) and diversity, equity and inclusion (DEI) training (45%), but educators would like institutions that do not currently do so to offer research funding (30%), technology training (27%), and professional certificate funding (26%).

HOW INSTITUTIONS CAN BETTER SUPPORT AND EMPOWER EDUCATORS

PROFESSIONAL DEVELOPMENT OFFERED TO EDUCATORS

PROFESSIONAL DEVELOPMENT WANTED THAT IS NOT OFFERED

WHAT EDUCATORS THINK:

Fewer than half of educators feel highly empowered by their institution.

To feel empowered by my institution means being cared for in terms of my physical and mental health as well as getting chances for my personal growth and career development.

— EMEA EDUCATOR

The institution that one is affiliated with can make you feel empowered in a way that they give importance to your mental health and work-life balance.

— APAC EDUCATOR

To feel empowered by my institution means I'm given the authority, ability and resources to go beyond traditional classroom education to improve a student's performance, mental health, and academic outcomes.

— NORAM EDUCATOR

Our Perspective

Educators are the engines of higher education. Supporting their well-being inside and beyond the classroom will influence their ability to support student success and engagement, ultimately fortifying global higher education. Students and educators cannot teach and learn within a vacuum. Personal and family life are not isolated factors that impact their journeys – it informs them. How a student or educator experiences life outside the classroom will impact their experience within the classroom.

At the height of the pandemic, it became clear how much students needed mental health support. Educators took it upon themselves to find ways to assist student mental health and advocated for better accessibility to these resources. The onus is on institutions to broaden faculty assistance to include more holistic solutions for empowerment, while continuing to respond to the mental and personal health needs of students and educators. The findings also suggest that students are unaware of or not leveraging the mental health resources schools make available. Institutions can bridge this gap with intentional marketing to increase the visibility and awareness of mental health resources for students.

Through this research, it has become clear how necessary it is for institutions to support lifelong learning for students as well as educators. Institutions must find additional ways to contribute to educators' professional and personal development, as they are invaluable to the success of higher education.

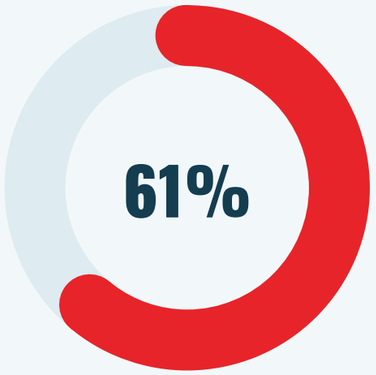
CONSIDERATIONS:

- **Take inventory of the mental health resources students find helpful within your institution and ensure those resources are visible to and shared widely with students.**
- **Identify ways to streamline and automate administrative tasks for both students and educators (ie. through LMS functionality, educational technology or generative AI) in an effort to free up more of their time for resting and recharging.**
- **Gauge the needs and desires of educators within the institution to develop and pinpoint opportunities for professional development that educators can showcase throughout their careers.**
- **Celebrate educators. Establish recognition programs that highlight the awesome work and innovation of today's educators.**

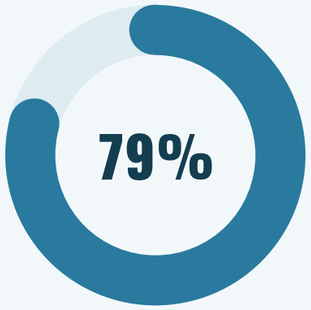
Regional Snapshots

04

Lifelong Learning



of **ALL** respondents say economic issues and immediate workforce opportunities are most impactful to student enrollment



of **NORAM** respondents say student loan forgiveness policies impact student enrollment

STUDENTS CONSIDER CERTIFICATES & APPRENTICESHIPS MOST FOR SKILLS-BASED LEARNING

- **NORTH AMERICA (NORAM)**
- **EUROPE, THE MIDDLE EAST, AND AFRICA (EMEA)**
- **ASIA PACIFIC (APAC)**

NORTH AMERICA

- NORAM students are significantly more likely to **consider certificate** (58%) programs.
- **Career advancement** (65%), **learning new skills** (62%), and **cost** (61%) are most influential to NORAM students when considering skills-based learning opportunities.
- Most NORAM respondents say **student loan forgiveness policies** (79%) are impactful to student enrollment, in addition to **economic issues** (82%) and **immediate workforce opportunities** (82%).
- They value skills-based learning for its **practical skills application** (76%), **progress/performance feedback** (70%), and **program flexibility** (70%).

EUROPE, THE MIDDLE EAST, AND AFRICA

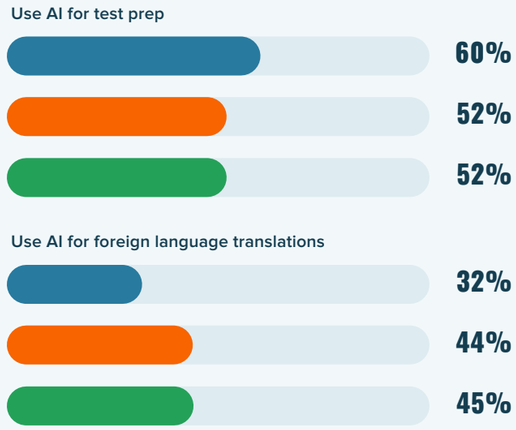
- EMEA students are **most likely to consider apprenticeships** (54%) for career advancement, significantly more so than NORAM (35%) and APAC (35%) students.
- **Wanting to learn new skills** (57%), and **career advancement** (56%) are most influential to EMEA students when considering skills-based learning opportunities.
- EMEA respondents say **economic issues** (78%) and **immediate workforce opportunities** (76%) are most impactful to student enrollment.
- They value skills-based learning for its **practical application of knowledge and skills** (73%).

ASIA PACIFIC

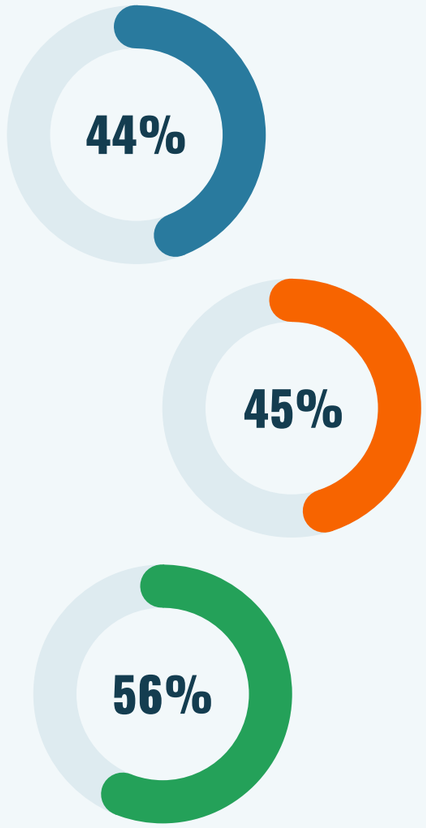
- APAC students are **most likely to consider certificate** (53%) programs.
- **Wanting to learn new skills** (66%) and **career advancement** (62%) are most influential to APAC students when considering skills-based learning opportunities.
- APAC respondents say **economic issues** (79%) and **immediate workforce opportunities** (75%) are most impactful to student enrollment.
- They **value skills-based learning for its practical skills application** (75%) and **progress/performance feedback** (69%).

Technology

MOST COMMON USES OF AI FOR STUDENTS



RESPONDENTS WHO ACCESS THEIR LMS VIA THE MOBILE APP



- NORTH AMERICA (NORAM)
- EUROPE, THE MIDDLE EAST, AND AFRICA (EMEA)
- ASIA PACIFIC (APAC)

NORTH AMERICA

- One-quarter of NORAM respondents (22%) are **currently using generative AI for courses**. Students use AI for **research/writing** (71%) and are significantly more likely than other regions to use AI for **test preparation** (60%).
- More than three-quarters of NORAM respondents (79%) believe their **LMS has positively impacted student engagement**, specifically through use of **communication tools** (76%) and **organizing coursework** (75%).
- **Cost of technology** (50%) and **infrastructure** (37%) are the **main roadblocks** to students accessing technology.

EUROPE, THE MIDDLE EAST, AND AFRICA

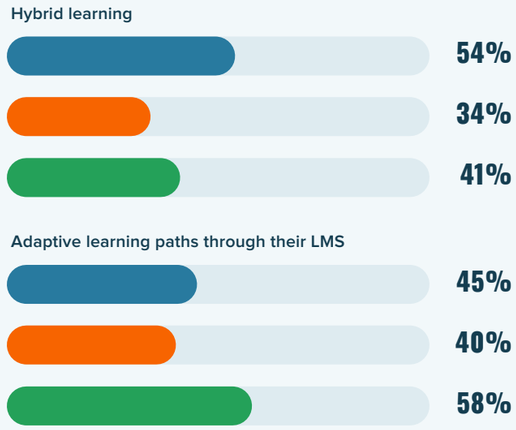
- One-third of EMEA respondents (32%) are **currently using generative AI for courses**. EMEA students use AI for **research/writing** (60%), **test preparation** (52%), and **foreign language learning** (44%).
- Three-quarters of EMEA respondents (74%) believe their **LMS has positively impacted student engagement**, specifically through **communication tools** (56%), **material sharing** (55%), and **organizing coursework** (52%).
- **Cost of technology** (42%) and **infrastructure** (35%) are the **main roadblocks** to students accessing technology.

ASIA PACIFIC

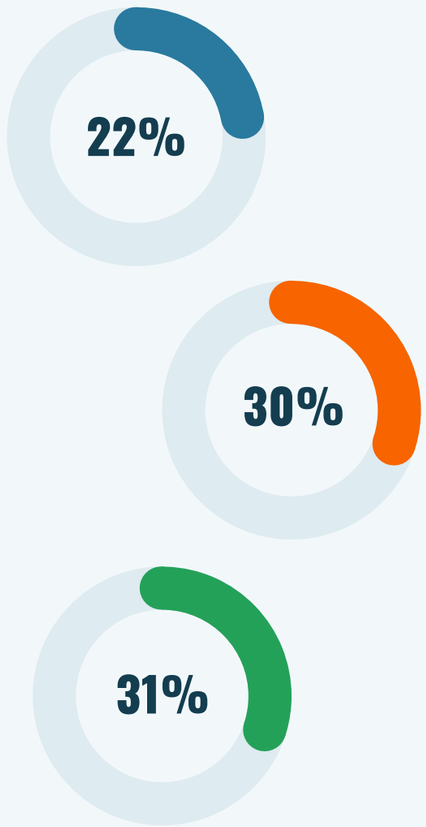
- One-third of APAC respondents (32%) are **currently using generative AI for courses.**
- APAC respondents (56%) are significantly more likely to say they **frequently use the mobile app to access their LMS** compared to NORAM (44%) and EMEA (45%) respondents.
- Most APAC respondents (85%) **believe their LMS has positively impacted student engagement**, significantly more so than NORAM (79%) and EMEA (74%) respondents.
- **Cost of technology** (49%) and **infrastructure** (44%) are the **main roadblocks** to students accessing technology.

Accessibility

INSTITUTION OFFERINGS



RESPONDENTS LIVING IN LEARNING DESERTS



- NORTH AMERICA (NORAM)
- EUROPE, THE MIDDLE EAST, AND AFRICA (EMEA)
- ASIA PACIFIC (APAC)

NORTH AMERICA

- NORAM respondents say their institution is increasing accessibility by **ensuring classrooms are physically accessible** (61%) and are significantly more likely to say their institution is **offering hybrid learning** (54%) compared to EMEA (34%) and APAC (41%) respondents.
- Half of NORAM respondents (56%) **do not believe they live in a learning desert**, while one-quarter (22%) believe they do, which is significantly less than EMEA (30%) and APAC (31%).
- **Access to technology** (85%) and **psychological well-being** (84%) are the **most impactful socioeconomic factors** to NORAM student engagement.

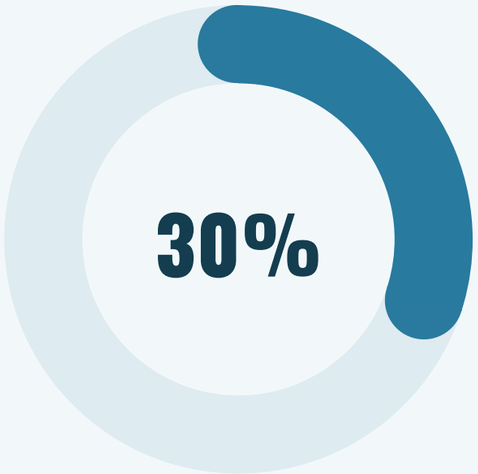
EUROPE, THE MIDDLE EAST, AND AFRICA

- EMEA respondents say their institutions are increasing accessibility by **ensuring classrooms are physically accessible** (53%) and **providing technology to students who cannot access it** (42%).
- **Nearly half** of EMEA respondents (47%) **do not believe they live in a learning desert**, while **nearly one-third** (30%) **believe they do**, significantly more than NORAM (22%).
- **Psychological well-being** (82%), **access to technology** (80%), and **home life/wellness** (80%) are the most impactful socioeconomic factors to EMEA student engagement.

ASIA PACIFIC

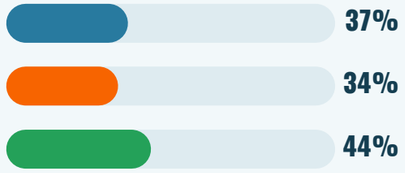
- APAC respondents say their institution is increasing accessibility by **ensuring classrooms are physically accessible** (56%) and **using ed tech solutions** (53%).
- **Nearly half** of APAC respondents (47%) **do not believe they live in a learning desert**, while **nearly one-third** (31%) **believe they do**, which is significantly more than NORAM (22%).
- **Access to technology** (83%), and **household income** (81%) are the **most impactful socioeconomic factors** to APAC student engagement.

Mental Health



of **NORAM** educators
feel highly empowered,
compared to **46%** in **EMEA**
and **41%** in **APAC**

INSTITUTIONS USING THEIR LMS TO CONNECT STUDENTS TO SUPPORT GROUPS



- **NORTH AMERICA (NORAM)**
- **EUROPE, THE MIDDLE EAST, AND AFRICA (EMEA)**
- **ASIA PACIFIC (APAC)**

NORTH AMERICA

- NORAM institutions offer **counseling** (66%), **well-being events** (57%), and **mental health hotlines** (54%). They are significantly more likely to offer more mental health resources compared to EMEA and APAC.
- NORAM respondents **want their institutions to offer personal/ mental health days off** (41%) and **mental health apps** (26%) if they do not already do so.
- NORAM educators (30%) are **significantly less likely** than EMEA (46%) and APAC (41%) educators **to say they feel empowered by their institution. Offering more personal development opportunities** (43%) and **acknowledging achievements** (40%) would help empower them.

EUROPE, THE MIDDLE EAST, AND AFRICA

- EMEA institutions offer **counseling** (43%), **well-being events** (34%), and **support groups** (34%). They are significantly less likely to offer more mental health resources compared to NORAM institutions.
- EMEA respondents **want their institutions to offer personal/ mental health days off** (41%) and **mental health apps** (29%) if they do not already do so.
- **Nearly half** of EMEA educators (46%) **feel empowered by their institution**, significantly more than NORAM (30%). **Offering more personal development opportunities** (44%) and **acknowledging achievements** (44%) would help empower them.

ASIA PACIFIC

- APAC institutions offer **counseling** (51%) and **campus well-being events** (44%). They are significantly less likely to offer more mental health resources compared to NORAM institutions.
- APAC respondents **want their institutions to offer personal/ mental health days off** (35%) and **mental health apps** (32%) if they do not already do so.
- **Nearly half** of APAC educators (41%) **feel empowered by their institution**, significantly more than NORAM (30%). **Offering more personal development opportunities** (52%) and **acknowledging achievements** (46%) would help empower them.

On the Horizon

As higher education embraces the introduction of new tools, pedagogy, and opportunities for expansion, supporting students and educators must remain a core focus. Shifts in workforce demands, educational needs, and technological advancements will forever alter teaching and learning. The goal for institutions should be learning how to balance responding to these changes with greater ingenuity with maintaining support and consideration for students and educators.

No trend or tool in higher education exists apart from the others. Like puzzle pieces, each represents one part of a bigger picture. Instead of shying away from unknowns like generative AI and emerging technology, become curious about the ways in which students and educators can best engage with various tools and each other while maintaining healthy personal and professional lives.

If you'd like to receive research updates or have any questions on this report, we invite you to contact us at studentsuccess@instructure.com.

Appendix 05

Research Methodology

We developed the State of Student Success and Engagement in Higher Education survey in coordination with Hanover Research. The survey was designed to understand how higher education students and administrators define student success and engagement and how that varies around the globe.

The survey was fielded in July 2023 and was cleaned and analyzed by Hanover Research. After fielding and data cleaning, the study consisted of 6,100 qualified, completed responses. The data was then cut into crosstabs by region, country, and role, along with various additional subsegments, such as socio-economic status. We performed statistical significance testing across segments with a 95% confidence level using a Z-Test with p = less than 0.05 and a margin of error +/- 1% for the overall sample size. For any questions regarding the underlying methodology or data, please contact us at studentsuccess@instructure.com.

ABOUT HANOVER RESEARCH

Founded in 2003, Hanover Research is a global research and analytics firm that delivers market intelligence through a unique, fixed-fee model to more than 1,000 clients. Headquartered in Arlington, Virginia, Hanover has been named a Top 50 Market Research Firm by the American Marketing Association every year since 2015. To learn more about Hanover Research, visit hanoverresearch.com.

RESPONDENT CHARACTERISTICS (N= 6,100)

Region

NORAM (n=2,397) **39%**

EMEA (n=2,501) **41%**

APAC (n=1,202) **20%**

Role

Student (n=4,850) **80%**

Educator (n=1,250) **20%**

AGE

18-24	65%
25-34	16%
35-44	8%
45-54	5%
55+	5%

EMPLOYMENT STATUS

Full-time	16%
Part-time	4%
Student	80%

EDUCATION INSTITUTION

Private, 2-year college or university	3%
Public, 2-year college or university	9%
Private, 4-year college or university	11%
Public, 4-year college or university	26%
Private college or university	6%
Public college or university	21%
National, 2-year college	0%
Private, 2-year college	0%
Public, 2-year college	0%
National, 4-year university	1%
Private, 4-year university	2%
Public, 4-year university	1%
University	20%

JOB ROLE

Faculty member	57%
Academic staff	29%
Administrator	14%
Other	0%

YEARS OF EXPERIENCE

0 to 1 years	4%
2 to 5 years	28%
6 to 10 years	21%
11 to 15 years	18%
16 to 20 years	10%
21 years or more	19%
Prefer not to respond	0%

INSTITUTION LOCATION

Urban area	52%
Suburban area	33%
Rural area	13%
Prefer not to say	2%

NUMBER OF STUDENTS

Less than 1,000	9%
1,000 to 4,999	20%
5,000 to 9,999	14%
10,000 to 14,999	11%
15,000 to 19,999	7%
20,000 to 24,999	7%
25,000 or more	16%
I don't know/Prefer not to respond	16%

NUMBER OF FACULTY AND STAFF

0 to 249 employees	32%
250 to 499 employees	20%
500 to 999 employees	17%
1,000 to 4,999 employees	16%
5,000 to 19,999 employees	6%
20,000 employees or more	2%
I don't know/Prefer not to respond	7%

GENDER IDENTITY

Male	39%
Female	59%
Other	1%
Prefer not to say	1%

MAJOR OR DEGREE PROGRAM

Arts and Humanities	13%
Behavioral and Social Sciences	10%
Business	14%
Education	10%
Engineering and Technology	18%
Journalism	2%
Medical and Natural Sciences	19%
Public Policy	2%
Other	11%
Prefer not to respond	2%

FAMILY EDUCATION

First in my family to attend college or university	28%
Siblings attended college or university before me, but parents did not attend university	20%
Parents attended college or university before me, but grandparents did not attend university	29%
Parents and grandparents attended college or university before me	19%
Other	1%
Prefer not to respond	3%

HOUSEHOLD STRUCTURE

Two parents in home only	55%
One parent in home only	18%
Parent(s) and grandparent(s)	8%
Parent(s) and extended family member(s)	12%
No parents in home/Raised by guardian	3%
Other	2%
Prefer not to respond	3%

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Powering the World's Smartest Classrooms.

Instructure is an education technology company dedicated to helping everyone learn together. We amplify the power of teaching and elevate the learning process, leading to improved student outcomes. We strive to make learning more personal and student success more equitable by delivering solutions to support, enrich, and connect every aspect of teaching and learning. In addition to Canvas LMS, Instructure offers the assessment tools and quality content educators need to implement a successful assessment program that drives learning forward. Today, Instructure supports more than **30 million educators and learners** at more than **6,000 organizations** around the world.

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