TIME FOR CLASS

2025

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INTRODUCTION

Five years after the pandemic accelerated a shift toward online learning and three years into the widespread and transformational adoption of generative AI tools, the higher education teaching and learning ecosystem is still adapting.

In this year's report, we suggest that the sector is in the early stages of *renorming*, i.e., redefining how institutions engage learners through expanded toolkits and new practices that support both instructors and students. The rapid evolution of digital tools has not only reshaped what is technically possible in teaching and learning but also surfaced new patterns in how students and faculty seek support.

Alongside these technological shifts, we observe an emphasis on demonstrating the return on investment (ROI) from higher education. Total enrollment at higher education institutions in the US only just returned to prepandemic (2019) levels in fall 2024.[1] With the demographic cliff approaching,[2] institutions will remain focused on retaining the populations that were hard-won postpandemic with strategies that keep learners engaged, support persistence toward credential attainment, and, ultimately, facilitate pathways to meaningful employment.

This year's findings include updated data on the growing need for generative AI literacy, as well as rising student interest in nondegree credentials (NDCs) to signal workforce readiness to employers. We hope you find this report valuable, and we welcome your thoughts and engagement as we explore these critical topics together. **In particular, institutions are solving for the intersection of several persistent needs:**

- **Instructors are dealing with persistent and emerging challenges**, including student attendance (i.e., getting students to attend classes) and preventing student cheating, which has been top of mind for instructors since ChatGPT's public release in fall 2022.
- **A lack of data on student demographics complicates the challenge** of personalization to create a sense of belonging and encourage student attendance.
- **Students seek more human-based and technology-augmented supports** as they face mental health challenges and strive to build effective study skills. Even as the acceptance of generative AI is on the rise, it has yet to meet student needs related to concept learning.
- **Administrators seek to implement solutions at the intersection of these needs**—addressing academic honesty through clear coaching and guardrails around AI use, paired with strategic efforts to improve attendance and engagement. Institutions seek digital tools that go beyond content delivery (e.g., identifying at-risk students and providing insight into student sentiments).

1. According to *Current Term Enrollment Estimates* from National Student Clearinghouse for fall 2024, total higher education enrollment at all US institutions reached 19.1M in 2024 after sitting at 18.1-18.6M from fall 2020 to fall 2023
2. The demographic cliff refers to the decline in the number of college-age students who will be eligible to pursue postsecondary studies starting in 2026, resulting from decreased birth rates during and after the Great Recession

Through an exploration of large-scale surveys fielded to higher education administrators, faculty, and students,[3] *Time for Class 2025* suggests opportunities for digital learning providers and institutions to develop and deliver data-backed solutions that address these core needs.

KEY FINDINGS

- **Instructors and students prefer more face-to-face interactions and engagement.**
  - Instructors' preference for face-to-face teaching is on the rise (55% preferred in 2023 compared to 64% in 2025) (see Figure 1).
  - Student preference mirrors that of faculty, though they desire to maintain the flexibility of hybrid learning (33% prefer face-to-face while 29% prefer hybrid, up from 25% and 22% in 2023, respectively) (see Figure 1).
  - Desire for human-based supports is driven by persistent engagement challenges among students. Half of instructors (48%) this year report students feeling overwhelmed about academics as a top challenge (consistent with 50% in spring 2024) (see Figure 3). More than a third (38%) also report a perceived lack of motivation among students, consistent with last year's findings (see Figure 3).
  - Students echo these concerns, with 32% of first-year students and 28% of second-year+ students citing a lack of motivation as a leading classroom challenge (see Figure 3).
- **Students prefer human-centered learning supports, while instructors lack data on student sentiments to better deliver them.**
  - Students consistently prefer human-focused learning supports (83% in spring 2024 and 84% in spring 2025) (see Figure 2), with instructors remaining largely reliant on their own observations of their students' sentiments (46%) to help improve student outcomes rather than turning first to their LMS (32%) or courseware (21%) (see Figure 4).
  - Instructors of introductory courses express a top need for more student sentiment data on students' level of frustration or confidence (35%)—greater than grades in other courses (23%) (see Figure 12).

3. Surveys yielded the following response counts: administrators (n=312), instructors (1,572), and students (1,528). More detail on the demographic breakdowns of these audiences is available in the Appendix

- **Generative AI (GenAI)[4] can lead to efficiency benefits for students and instructors, though concerns about academic integrity persist.**
  - Personal use of GenAI tools has increased across all institutional audiences since spring 2023, with daily or weekly use up to 40% among administrators (from 2% in spring 2023), 30% among instructors (from 4% in spring 2023), and 42% among students in spring 2025 (from 14% in spring 2023) (see Figure 7).
  - Preventing student cheating and increasing student attendance are the top instructional challenges among instructors teaching introductory or developmental courses (45% and 44%, respectively) (see Figure 7).
  - More instructors indicate that GenAI has resulted in a net increase rather than a decrease in their workload, noting substantial time spent monitoring for cheating (71%) and redesigning assessments (61%) (see Figure 6).
    - However, instructors who use GenAI daily are taking a more positive, proactive stance (45% of daily user instructors have implemented or are planning to implement a policy to teach students how to effectively prompt GenAI tools to assist with assignments, compared to 11% of those who have used them once or twice) (see Figure 11).
  - Instructors who use GenAI daily are more likely to see their workloads decrease (36% of daily users) rather than increase (26% of daily users), indicating there are unrealized efficiency gains to be had as usage frequency continues to rise (see Figure 9).

CALL TO ACTION: GENERATIVE AI

Generative AI is here to stay as daily and weekly usage of third-party GenAI tools continues to rise among administrators, instructors, and students (see Figure 7). Harnessing the power of GenAI tools at scale can drive greater efficiency at both the institutional and classroom levels while also supporting stronger academic outcomes and student success.

We pose a call to action for institutions and platform providers to facilitate student preparedness for an AI-driven world:

- **Instructors: Use generative AI tools to improve workflows and personalize instruction at scale.**
  More instructors are reporting that GenAI is causing their workload to increase (38%) compared to those who have seen a decrease (11%). Time spent monitoring for cheating and redesigning assessments to counter AI usage is the driver of increased workload (see Figure 6). Daily users are more likely to see a decrease in workload (36%) than an increase (26%) (see Figure 9). These users are also twice as likely to implement policies teaching students how to use GenAI effectively. Instructors should explore deeper, more frequent engagement with GenAI to streamline tasks and support student outcomes. In particular, experienced GenAI users provide a template for how to reallocate time by using AI to automate manual tasks like grading and focus on more 1:1 interactions with students.

4. Generative AI tools are digital tools that use artificial intelligence (AI) technology to generate new, human-like written text, images, code, or other output (e.g., ChatGPT, Gemini) from human input

- **Administrators: Identify how to best prepare students to enter an AI-forward working world.**
  Most administrators (82%) and instructors (69%) agree that students need to know how to use GenAI for future jobs and careers (see Figure 5a)—and market data supports this. Jobs requiring specialist AI skills are growing at 3.5x the rate of all jobs and carry a potential 25% wage premium.[5] Institutions must prepare students for AI-integrated careers by setting clear policies that encourage ethical, skill-building uses of GenAI.

- **Solution Providers: Educate your customers about investments made in GenAI.**
  Solution providers should clearly communicate how recent generative AI investments can both save instructors time and surface the data they value most, such as student sentiment and engagement insights. Coaching faculty on the use of embedded, guardrailed GenAI tools within courseware or LMS platforms can drive faculty confidence and adoption, thus reducing underutilization while also easing concerns about student misuse.

  At the same time, platform providers should balance transparency of usage with student trust. Students may be turning to standalone GenAI tools like ChatGPT to ask questions they view as basic or fear might reflect poorly on them in front of instructors. To encourage the use of embedded tools among faculty and students, solution providers should make transparent how student data and usage behavior are captured and which data are elevated to a faculty view. Demonstrating the utility and pedagogical value of GenAI features will position platforms as essential tools for improving student outcomes and instructional efficiency.

CALL TO ACTION: STUDENT SUPPORTS

We also propose a call to action to empower educators to connect students to the holistic supports they need to obtain their degree or credential:

- **Administrators: Arm faculty with tools to support student success.**
  Faculty must be equipped with the right tools and information to connect students to support. Most still rely on personal observations to determine how to modify instruction to meet student needs. Student sentiment data and demographic indicators **are missing from the tools that faculty are using**. Without this critical input, faculty may rely on biased assumptions about student ability and aptitude, limiting their capacity to connect students (particularly those who come from primarily underserved groups) to personalized support.

  Bridging this gap requires a systemic approach. To drive student engagement and retention, institutions must **provide accessible student support services and train faculty on identifying signs of stress**. Administrators can do this by creating the data infrastructure that connects teaching and learning tools to student success software and by ensuring that selected platforms provide data transparently not just on grades but also on holistic student indicators.

5. *PwC AI Jobs Barometer*

- **Solution Providers: Equip faculty to play the role of student success agent efficiently and effectively.**
  Instructors are signaling a strong need for better insights into student sentiment indicators—such as levels of frustration, confidence, and motivation—especially in gateway courses.[6] Faculty are unable to provide student support unless platforms can provide relevant student data (including data capture, storage, and analysis) that may indicate signs of stress or confidence levels. Platforms have an opportunity to integrate with institutions' SIS or CRM to bring in student demographic indicators. Building tools that have strong interoperability and use open edtech standards will enable institutions to establish data infrastructure that connects teaching and learning with student success and supports. A system built on the interconnectedness of data has the potential to proactively alert administrators and department heads when certain student groups (e.g., first-generation, BLI[7] students) are not being adequately served by current instruction and support services.

- **Instructors: Position role as one of both teacher and advocate for student success.**
  Faculty play a frontline role in connecting students to human-based support services, though they are constrained by limited time. Faculty have significant responsibilities in the classroom and spend an average of 26 hours a week on teaching and learning (see Figure 18). There is potential for AI and digital learning tools to automate manual tasks such as grading or content assessment, allowing faculty to spend more time on coaching and personalized connection. Building stronger relationships with students is particularly important at this moment in time as students' top classroom challenges center around motivation, workload, and study habits (see Figure 3).

  Using AI tools also has the benefit of empowering instructors with insights and results. As classroom leaders, faculty are a linchpin in connecting students to the support services that would benefit them most. To serve this role **efficiently, faculty need data and prompting on what individualized supports will be most effective for addressing student needs.**

6. The term "**gateway course**" is most often used in **education policy and reform** to identify where students, particularly underrepresented or first-generation students, may struggle and disengage. Improving success rates in gateway courses is seen as key to **retention and equity** in higher education. For this study, "introductory or developmental" and "gateway" are interchangeable, with the latter referring to access-enabling courses (e.g., introductory courses required for a major or general education requirements)
7. "BLI" stands for Black, Latino/a/x, and Indigenous

HUMAN-CENTERED TEACHING IN A DIGITAL WORLD

Instructors and students alike seek human connection and one-on-one mentorship in teaching and learning, a shift that has increased in recent years. Following a pandemic-led surge toward digital learning, institutions are rebalancing to combine the flexibility and benefits of digital learning with a need to play catch-up on student support offerings and human-based connection. Students are turning to peers and instructors at higher rates than digital tools for help with academic concepts. To foster a more human-centered learning experience, digital platforms should enhance instructor and administrator capacity to spend more time supporting students 1:1 by making direct connections and/or saving stakeholders time on manual tasks.

INSTRUCTORS AND STUDENT SHARE DESIRE FOR HUMAN CONNECTION

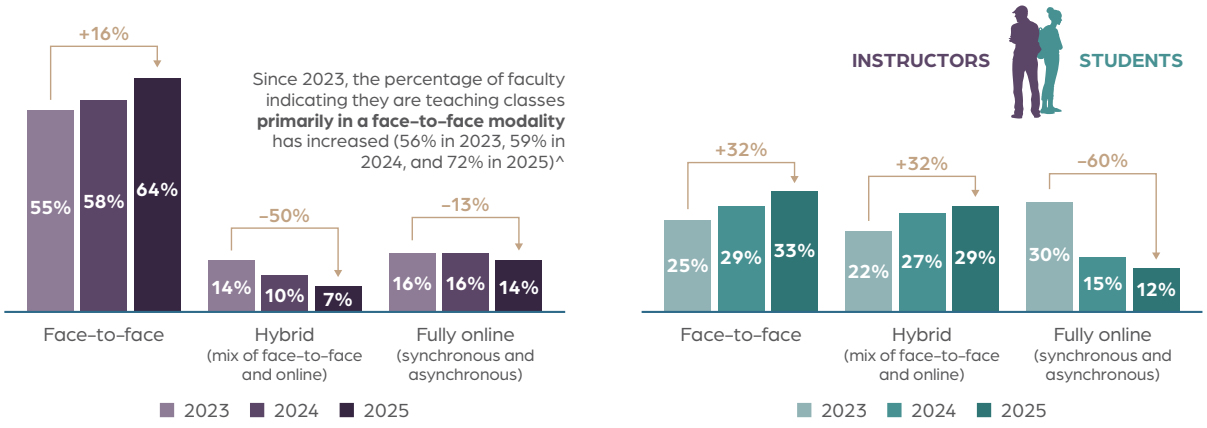
Face-to-face instruction is resurging, not just in preference but also in practice (see Figure 1). The percentage of instructors who prefer face-to-face teaching rose from 55% in 2023 to 64% in 2025. Students are echoing this shift: While 33% now prefer face-to-face courses (up from 25%), a growing 29% prefer hybrid instruction—a notable increase from 22% in 2023. Students prefer hybrid instruction due to the flexibility it offers. Notably, students who are parents or caregivers in 2025 are more likely to prefer fully online options (16% vs. 11%) and less likely to prefer face-to-face (26% vs. 35%) compared to nonparents. Offering hybrid modalities increases access for students dealing with responsibilities outside the classroom while preserving opportunities for in-person connection.

This swing back toward in-person interaction reflects a broader challenge: disengagement and declining student motivation. Students who lack in-person connection are navigating barriers to meaningful participation in their learning environments. As a result, they increasingly prefer in-person components to their courses. This trend is reflected in an institutional turn back toward in-person instruction, with an increase in the percentage of face-to-face courses offered versus other modalities (from 56% in 2023 to 72% in 2025).

Figure 1:

Preferred modality according to instructors* and students**

Among all instructor and student respondents



Notes: **Survey question: "In general, I prefer teaching courses _____", n=1,572 (Instructor, 2025), n=1,602 (Instructor, 2024); **Survey question: "If I had to choose just one way, in general, I prefer taking courses _____", n=1,529 (Student, 2025), n=1,526 (Student, 2024), n=2,056 (Student, 2023); ^Survey question: "Which of the following course modalities best describes the primary modality in which you teach?", n=1,572 (2025), n=1,602 (2024), n=1,747 (2023); 2025 Instructor data in chart(s) is weighted by institutional sector to reflect national representation*

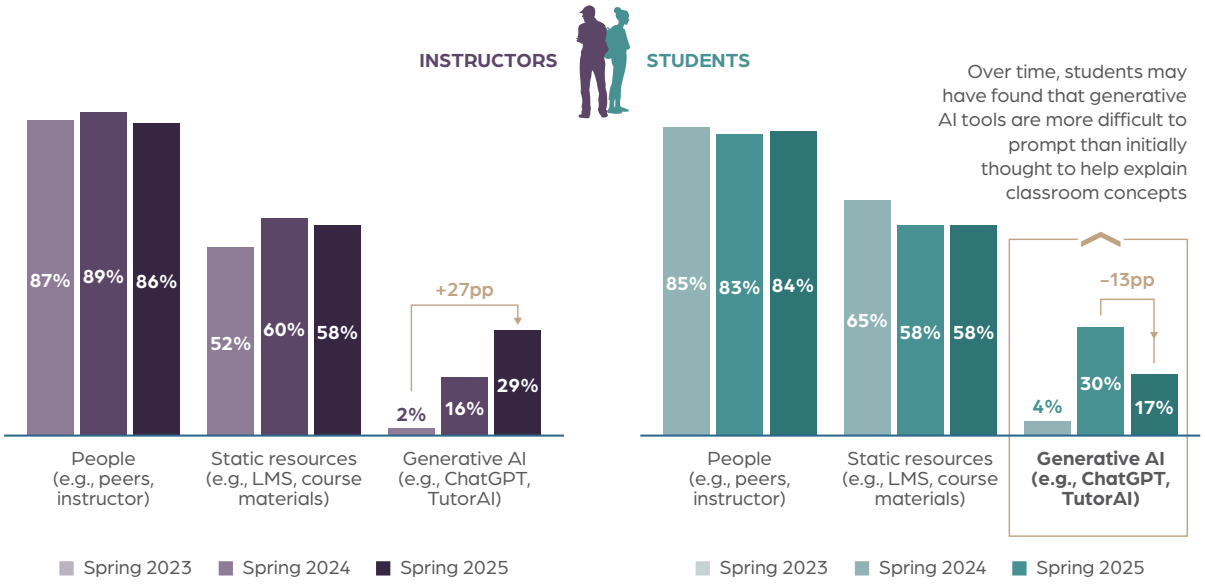
Sources: *Time for Class 2023-2025 Surveys, Tyton Partners analysis*

Faculty and students are calling for a return to meaningful human interaction. As engagement challenges persist, digital tools must enhance—not replace—the relationships that drive persistence and success. Students consistently turn to peers and instructors (84%) and digital tools (58%) for academic help, whereas they are decreasingly turning to ChatGPT to help explain concepts (see Figure 2). While there was a spike in students turning to ChatGPT for academic support in 2024 (30%), a recent dip (down to 17%) indicates that generative AI tools are less helpful than students initially thought. This sentiment is not reflected by instructors, who perceive an increase in the use of generative AI tools (from 2% in 2023 to 29% in 2025).

Figure 2:

Where students primarily turn for help when struggling in a course according to instructors* and students**

Among all instructor and student respondents



Notes: **Survey question: "When your students are struggling with a concept in a course, where do they primarily turn for help? Select top three.", n=1,722 (2023), n=1,804 (2024), n=1,357 (2025); **Survey question: "When you are struggling with a concept in your courses, where do you primarily prefer to turn for help? Select top 3.", n=2,056 (2023), n=1,526 (2024), n=1,210 (2025). 2025 Instructor data in chart(s) is weighted by institutional sector to reflect national representation*

Sources: *Time for Class 2023-2025 Surveys, Tyton Partners analysis*

INSTRUCTORS PERCEIVE STUDY HABITS, WORKLOAD, AND MOTIVATION AS TOP STUDENT CHALLENGES

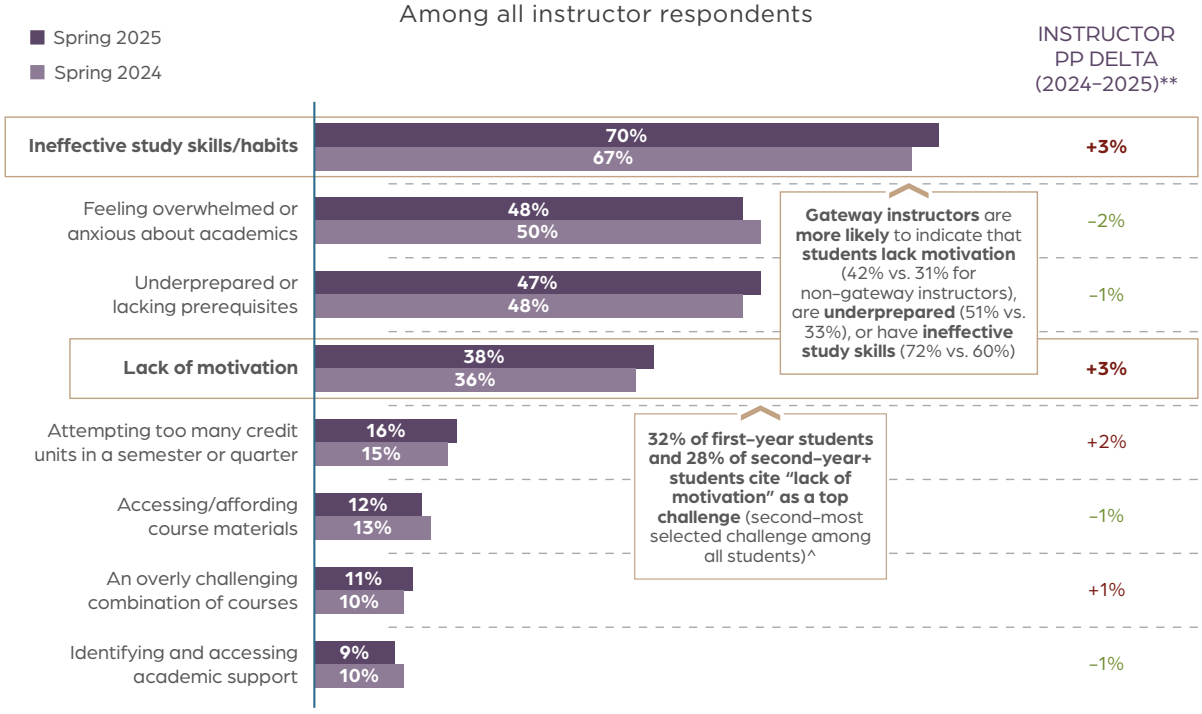
As students turn to human-centered and digital platforms for academic support, there is an opportunity for both people and platforms to help students address their top classroom challenges. Lack of motivation is a common struggle among students, with 32% of first-year students and 28% of second-year or older students citing lack of motivation as a top challenge (see Figure 3). Platform providers can play a critical role in helping students cultivate a mindset focused on improvement by embedding personalized reminders and notifications that encourage students to persist and build consistent study routines.

On the instructional side, faculty increasingly note that the primary classroom challenge for students is ineffective study skills or habits (70%), with disengagement being a top challenge according to over a third of faculty surveyed (38%, see Figure 3). Nearly half of instructors (48%) also report student anxiety about academics as a top concern, potentially driven by the effects of returning to the classroom post-COVID. Similarly, instructors note student motivation, workload, and mental health as top barriers to success (see Figure 3). In addition to sending encouraging reminders direct to students, platform providers should ping instructor users with prompts to initiate live connections with struggling students to address student feelings of stress and disengagement.

Figure 3:

Top classroom challenges according to instructors*

Among all instructor respondents



Notes: **Survey question: "What was most challenging for you/your students in the classroom this past term? Select top three." Instructor n=1,718 (2024); Instructor n=1,526 (2025); "Don't know" responses are excluded from denominators; **Delta may not match chart differences due to rounding; ^Survey question: "What was most challenging for you in the classroom this past term? Select top three." n=516 (First-year), n=926 (Second-year+). 2025 Instructor data in chart(s) is weighted by institutional sector to reflect national representation*

Sources: *Time for Class 2024 and 2025 Surveys, Tyton Partners analysis*

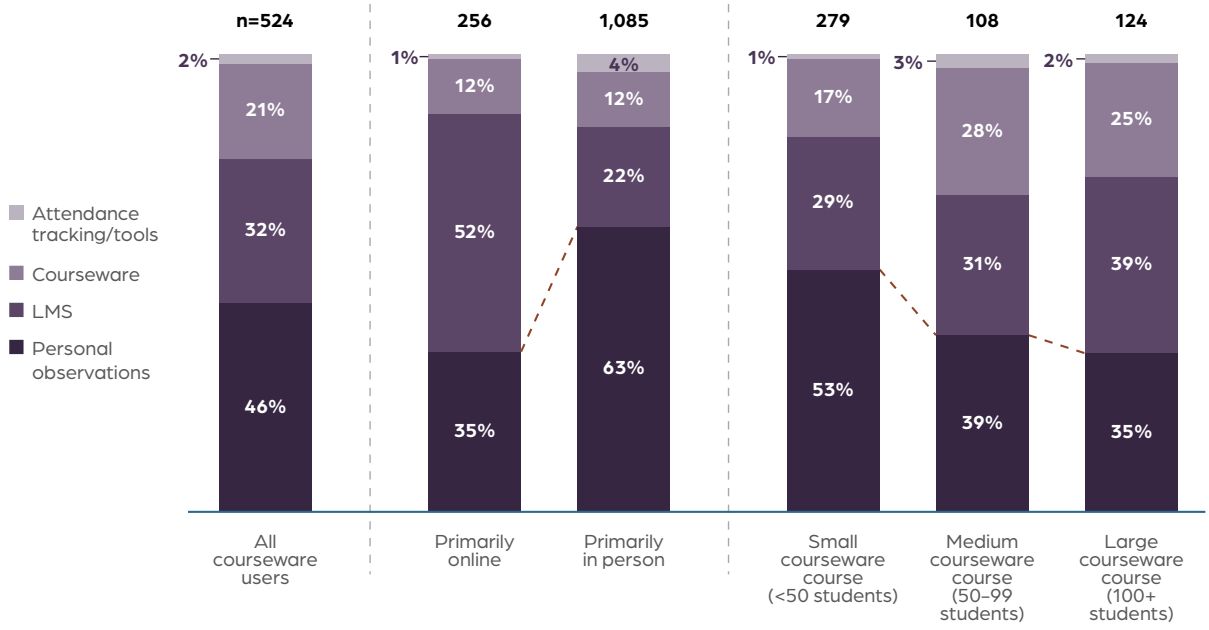
INSTRUCTORS DESIRE ACCESS TO STUDENT ENGAGEMENT AND DEMOGRAPHIC DATA

Additionally, faculty teaching online and faculty teaching large courses are relying on digital tools to measure engagement, though their capacity to interpret this data through the lens of personal observations may be limited by modality and bandwidth (see Figure 4). Personal observation is subjective and can introduce bias, primarily around assumptions about student ability and aptitude. Additionally, personal observation isn't as readily accessible to faculty teaching primarily online, nor is it practical to ask of faculty teaching large-enrollment courses, as shown in Figure 4. Instructors without access to reliable sentiment data risk missing early warning signs or misinterpreting student needs. Platforms that integrate data functions related to understanding can help instructors provide timely, targeted interventions that strengthen student engagement and belonging. Such tools can support instructors in solving students' top classroom challenges.

Figure 4:

Primary method of measuring engagement to improve outcomes*

Among instructor respondents



Notes: **Survey question: "Where do you typically go to measure/understand student engagement to help improve student outcomes?", Data in chart(s) is weighted by institutional sector to reflect national representation*

Sources: *Time for Class 2025 Surveys, Tyton Partners analysis*

As instructors and students seek a human-centered approach in their teaching and learning experience, platform providers can work alongside instructors to integrate classroom support and enhance student engagement. Providing relevant academic support, actionable student data, and engaging learning tools can position digital learning platforms as solutions that assist instructors in providing a higher-quality student experience that holistically addresses key needs.

GENAI IMPACT ON EFFICIENCY AND ACADEMIC INTEGRITY

Usage of generative AI tools is surging across all levels of higher education. Faculty and administrators agree on the importance of teaching students how to use AI tools, but they are split on where the responsibility for this teaching should land. Despite increasing usage and positive sentiments, institutional leaders and instructors are still navigating how to harness AI's potential to drive workload efficiencies while mitigating academic integrity concerns. This presents an opportunity for platform providers to support responsible usage among students and help institutional stakeholders unlock AI-driven workflow improvements.

INSTITUTIONAL STAKEHOLDERS AGREE ON THE IMPORTANCE OF TEACHING EFFECTIVE USE OF AI

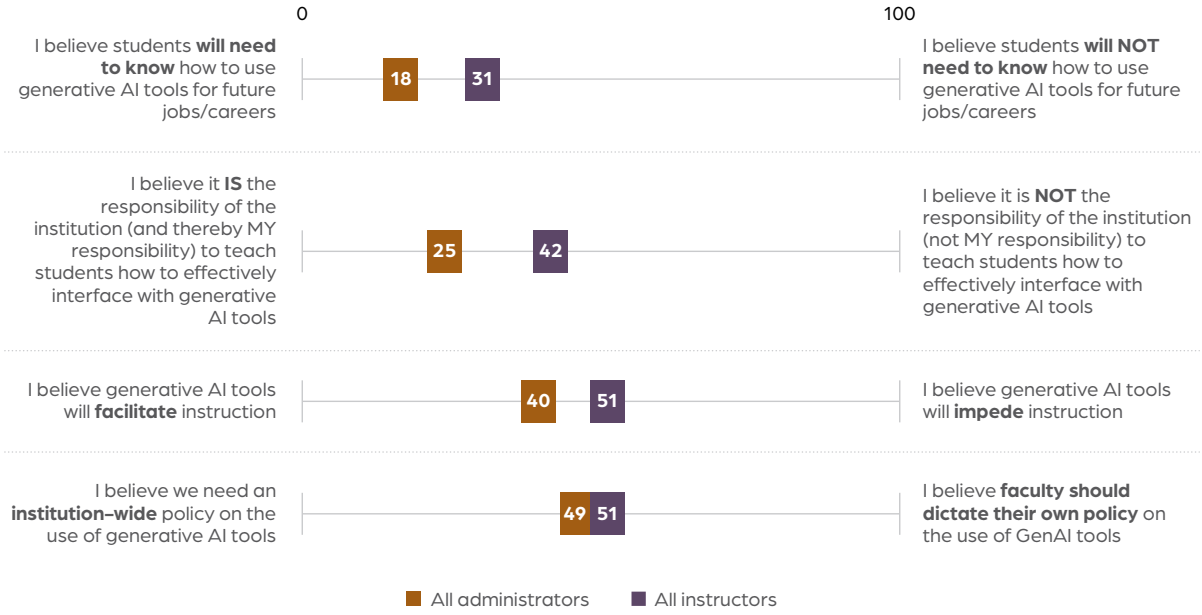
Faculty and administrators are split on whether generative AI is a benefit or a burden and on whether its use should be regulated at the course, department, or institution level (see Figures 5a and 5b). Still, both groups agree that students need AI skills for future careers and that institutions should play a role in teaching them how to engage with these tools (see Figure 5a).

This presents an opportunity for digital learning providers to partner with institutions on enterprise AI strategies. Institutions may benefit from thought partnership on where to set policy and how to implement it in ways that support evolving pedagogy while maintaining academic freedom for faculty. In tandem, digital learning providers will benefit from supporting institutions in creating and implementing these policies by helping their customers navigate the complex and changing higher education landscape.

Figure 5a:

Instructor and administrator sentiments toward GenAI use and policies*

Among all instructor and administrator respondents



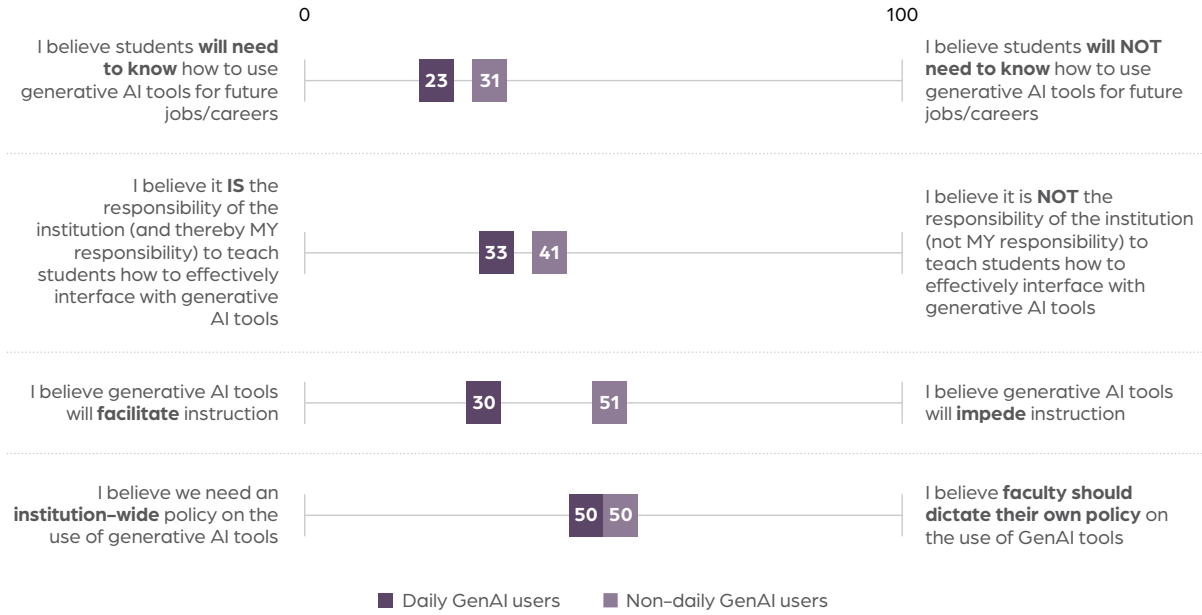
Notes: **Survey question: "For the next few questions, please read each pair of statements and decide to what extent you agree with one more than the other.", Instructor n=1,339, Administrator n=298; Data in chart(s) is weighted by institutional sector to reflect national representation*

Sources: *Time for Class 2025 Surveys, Tyton Partners analysis*

Figure 5b:

Instructor sentiments toward GenAI use and policies* by frequency of use

Among instructor respondents using generative AI



Notes: **Survey question: "For the next few questions, please read each pair of statements and decide to what extent you agree with one more than the other.", n=1,339; Data in chart(s) is weighted by institutional sector to reflect national representation*

Sources: *Time for Class 2025 Surveys, Tyton Partners analysis*

Despite growing confidence in the staying power of generative AI, many instructors report increased workloads as a result of its use (see Figure 6). Efficiency gains in grading and course development are often outweighed by time spent monitoring for cheating, redesigning assessments, and learning how to use AI tools (see Figure 6).

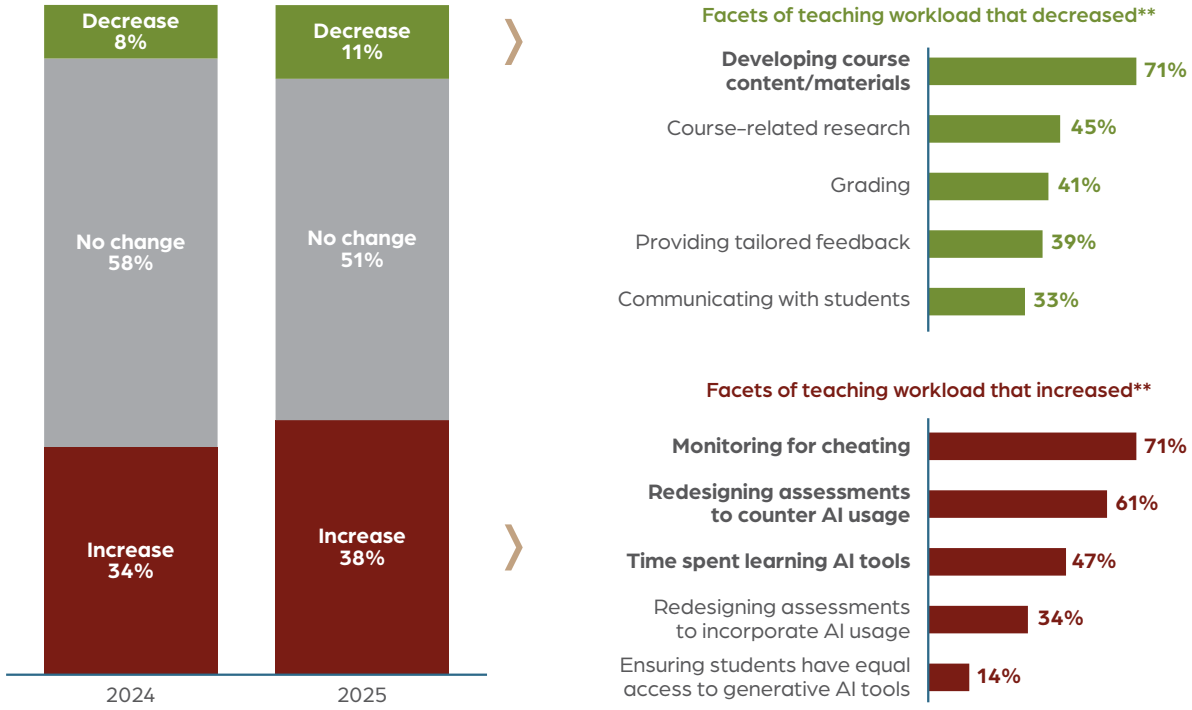
Increasing the visibility of student work can help address academic integrity concerns and reduce instructor burden. Similarly, supporting instructor learning on AI tools can mitigate a key source of time strain and unlock greater value from generative AI adoption.

> *"As an educator, I can't afford to take more than 30 minutes of my day on a task that isn't directly related to creating an assignment, research on a project, or assessing students' classwork. . . **We are busy professionals.**"*
> *– Faculty member, medium-sized public four-year institution*

Figure 6:

Overall shift in instructor workload due to GenAI tools*

Among all instructor respondents



Notes: **Survey question: "How has your overall workload as an instructor changed considering both your and your students' use of generative AI tools?", n=1,581 (2024), n=1,501 (2025); **Survey question: "What aspects of your teaching workload increase/decrease because of generative AI tools? Select all that apply.", n=571 (instructors who indicate an overall workload increase), n=160 (instructors who indicate an overall workload decrease); Data in chart(s) is weighted by institutional sector to reflect national representation*

Sources: *Time for Class 2024 and 2025 Surveys, Tyton Partners analysis*

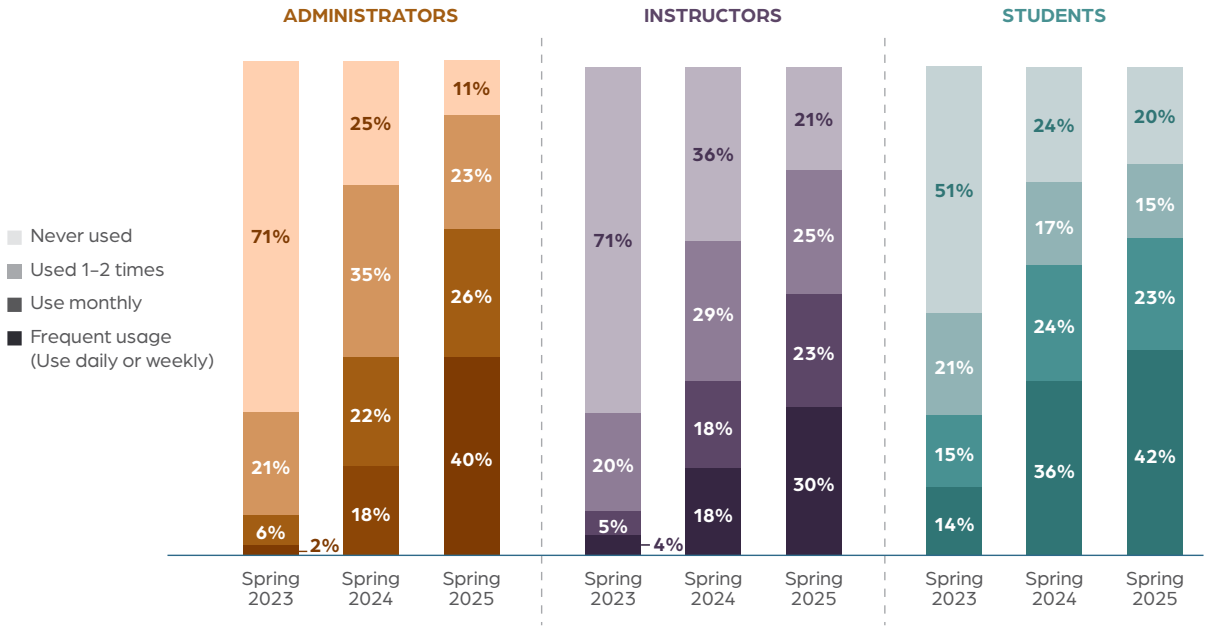
PERSONAL GENERATIVE AI USAGE IS SURGING, WITH POLICY IMPLEMENTATION IN PROGRESS

Generative AI is no longer an emerging trend. It is now widely used by students, instructors, and administrators. As of spring 2025, 42% of students, 40% of administrators, and 30% of instructors report using GenAI weekly or daily (see Figure 7).

Figure 7:

Time series of GenAI tool usage frequency*

Among all administrator, instructor, and student respondents



Notes: **Survey questions: "Which of the following best describes your own use of generative AI tools (e.g., ChatGPT, Bard/Gemini) for work?", Instructor n (Spring 2025) = 1,572, Administrator n (Spring 2025) = 311, Student n (Spring 2025) = 1,529 Instructor n (Spring 2024) = 1827, Administrator n (Spring 2024) = 316, Student n (Spring 2024) = 1526; "Which of the following best describes your own use of generative AI writing tools (e.g., ChatGPT)?" Instructor n (Fall 2023) = 1,601, Instructor n (Fall 2023) = 1,001; "Which of the following best describes your own use of generative AI writing tools (e.g., ChatGPT)?" Instructor n (Spring 2023) = 1748, Administrator n (Spring 2023) = 306, Student n (Spring 2023) = 1,545; 2025 faculty and administrator data in chart(s) is weighted by institutional sector to reflect national representation;*

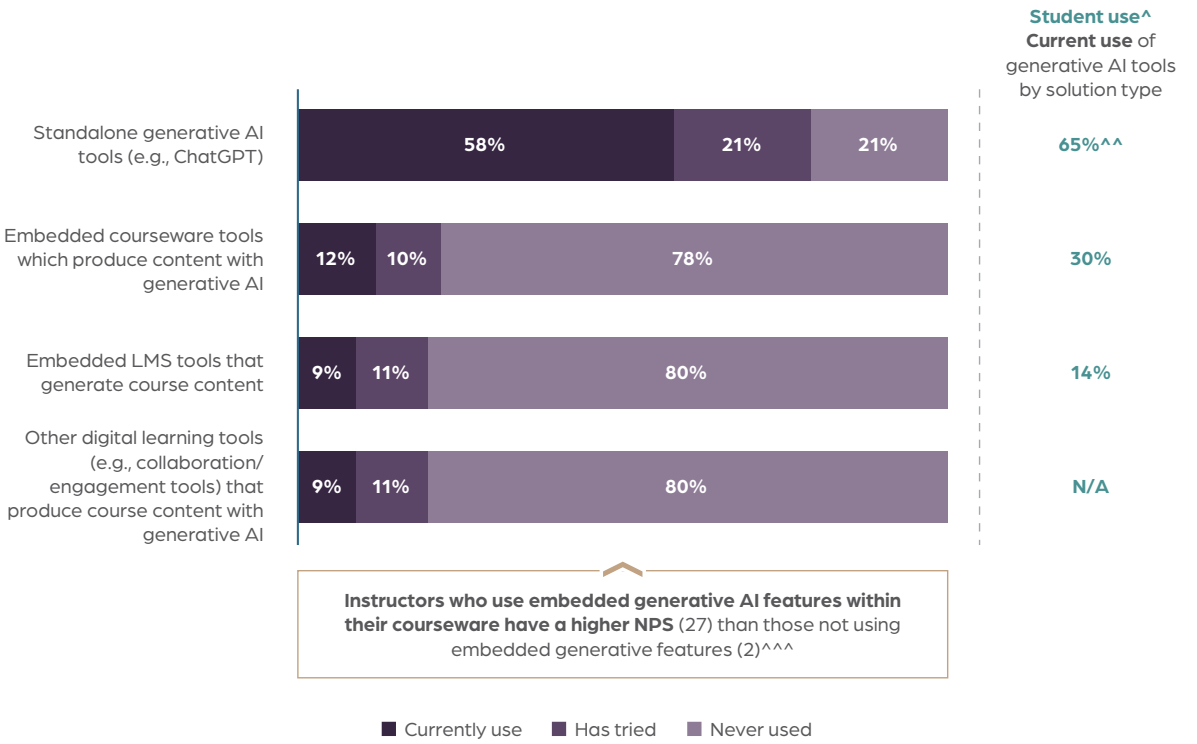
Sources: *Time for Class 2023-2025 Surveys, Fall 2023 Faculty & Student Pulse Surveys*

Instructors and students are primarily turning to standalone AI tools to manage their workloads (see Figure 8). Use of embedded LMS and courseware AI features remains limited with roughly 1 in 10 instructors indicating current utilization (see Figure 8). Even so, embedded solutions have clear value. Instructors using embedded generative AI features in their courseware report a higher NPS (27) than instructor courseware users who do not use embedded generative AI features (2) (see Figure 8). To drive satisfaction, solution providers should ensure that faculty and students are aware of investments made toward expanding generative AI functionalities.

Figure 8:

Instructor GenAI usage by solution type*

Among instructors who have used generative AI tools at least once**



Notes: **Survey question: "Do you use any of the following generative AI solution types?", n=1,242; **Respondents who saw this question are current or past users of Generative AI; ^Survey question: "Which of the following types of generative AI tools do you use?", n=1,529; ^^Survey question: "Which of the following best describes your own use of generative AI tools (e.g., ChatGPT, Bard/ Gemini) for work?", n=1,529; ^^^Survey question: "How likely are you to recommend this courseware product to a colleague?"; refers to percent of courseware users who are promoters (9 or 10) less detractors (1 to 6) on a 10-point scale; Data in chart(s) is weighted by institutional sector to reflect national representation*

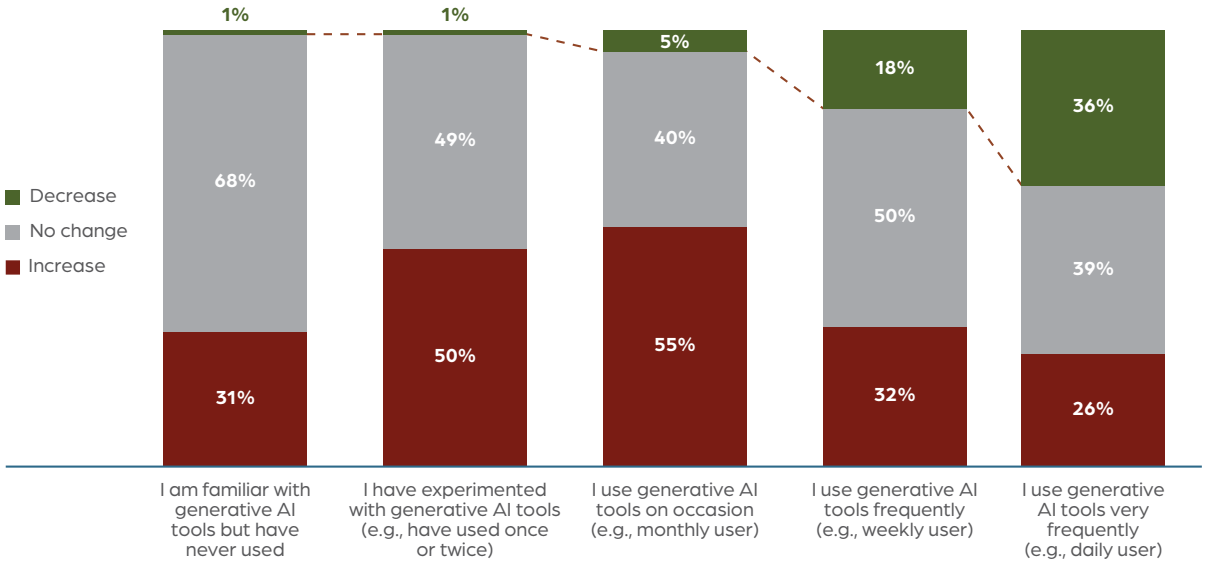
Sources: *Time for Class 2025 Surveys, Tyton Partners analysis*

Despite workload increases overall for faculty, generative AI holds promise for improving instructional efficiency. Faculty who use AI daily are seeing tangible benefits, with 36% of daily users reporting a decreased workload compared to 26% who report an increase (see Figure 9). Solution providers and institutions should facilitate an instructor user AI journey that focuses on daily use as a target. Getting faculty to interact with AI tools daily has the potential to result in meaningful ROI through increased time savings, so faculty can focus on more high-value tasks.

Figure 9:

Overall shift in instructor workload due to GenAI tools*

Among all instructor respondents, by AI usage frequency



Notes: **Survey question: "How has your overall workload as an instructor changed considering both your and your students' use of generative AI tools?", n=207-378; Data in chart(s) is weighted by institutional sector to reflect national representation*

Sources: *Time for Class 2025 Surveys, Tyton Partners analysis*

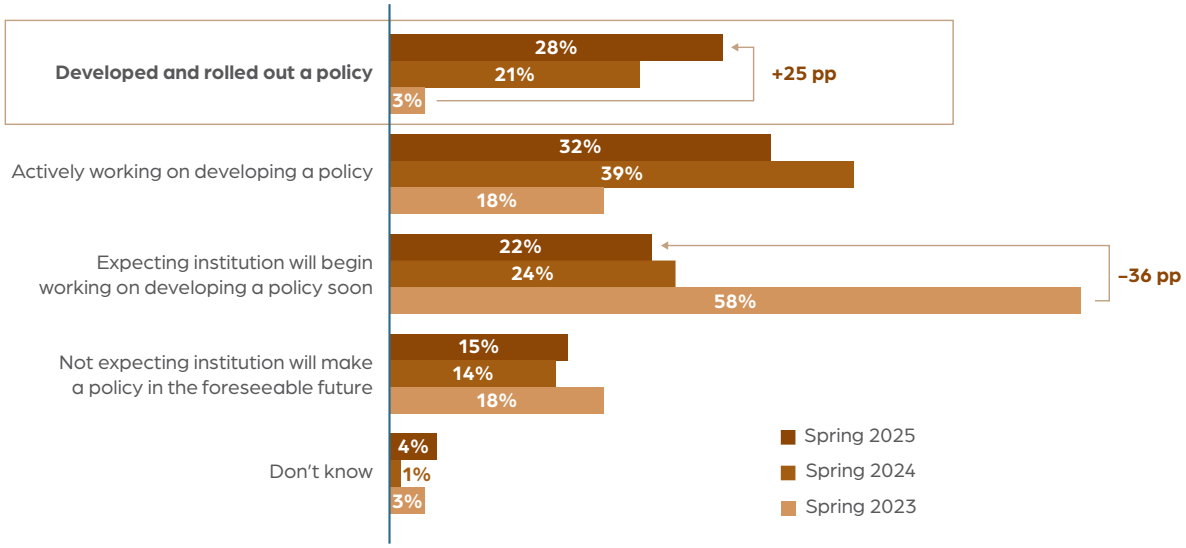
Despite surging usage overall and clear benefits from frequent usage, generative AI policy implementation remains uneven. Only 28% of institutions have formal policies in place, and another 32% are still developing them (see Figure 10), indicating that personal usage of GenAI tools is exceeding the pace of GenAI policy implementation. This presents an opportunity for institutions to take a more **proactive and intentional** stance by encouraging faculty to modify their pedagogy to support GenAI use cases (e.g., content and assessment creation).

> *"As institutions consider how to roll out AI policies and tools, they should adopt an ethos of 'hurry, slowly.' Rushing forward without sufficient evidence of learning outcomes is going to cause friction among stakeholders, and create reputational risk. Similarly, putting all-or-nothing policies in place is going to the extreme. Institutions need to be intentional about deploying new AI teaching and learning technologies without risking the development of critical thinking among students."*
> *– Michael Larsen, Studiosity CEO, said during "At the Cutting Edge of Student Success in Higher Ed" panel at ASU-GSV*

Figure 10:

Institutional GenAI policy current status according to administrators*

Among all administrator respondents



Notes: **Survey question: "Has your institution developed an institution-wide formal policy with respect to generative AI writing tools like ChatGPT?", Administrator n=305 (2025), Administrator n=233 (2024), Administrator n=168 (2023); Data in chart(s) is weighted by institutional sector to reflect national representation*

Sources: *Time for Class 2023-2025 Surveys, Tyton Partners analysis*

THE POWER OF EVERYDAY GENAI: FACULTY FIND NEW EFFICIENCIES AND RETHINK INSTRUCTIONAL PRACTICES

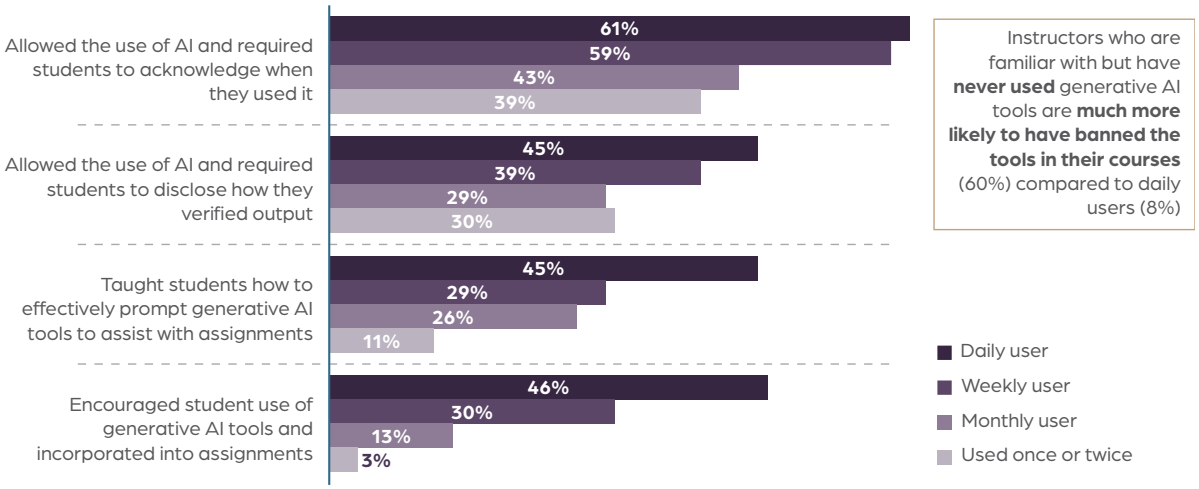
Moreover, daily generative AI usage by faculty unlocks different approaches to instruction. Among instructors who do not ban generative AI tools, 46% of daily users actively encourage student use, compared to only 3% of those who have used the tools once or twice (see Figure 11). These shifts can influence multiple aspects of the teaching and learning experience, such as guiding students in how to prompt generative AI to support their assignments and helping them use the tools to develop deeper conceptual understanding.

Institutions developing centralized AI policies should prioritize identifying non-users or occasional users and providing training on how to use these tools effectively, such as prompt engineering. Encouraging broad faculty engagement, especially daily use, is likely to result in meaningful time savings. With this reclaimed time, instructors can invest more in personalized student engagement.

Figure 11:

Instructor GenAI policies by GenAI usage frequency*

Among respondents who have policies, are working on one, or will begin to work on one in the next two to three years AND who don't ban generative AI in their courses



Notes: **Survey question: "Which of the following policies have you implemented or do you plan to implement in your courses to address generative AI tools? Select all that apply.", n=168 (Daily user), n=202 (Weekly user), n=246 (Monthly user), n=179 (Used once or twice); Data in chart(s) is weighted by institutional sector to reflect national representation*

Sources: *Time for Class 2025 Surveys, Tyton Partners analysis*

PLATFORMS AND COURSE MATERIALS AS STUDENT SUCCESS TOOLS

Core and supplementary course materials, along with the LMS, are not just instructional assets—they are tools that students and faculty engage with most frequently throughout the academic journey. Given this high frequency of use, these platforms have the potential to serve as powerful levers for student success. By focusing these solutions on instructional delivery as well as teaching and learning, digital learning providers risk missing opportunities to support broader student outcomes. While it's important to remain focused on their primary instructional purpose, our research is exploring the potential for these tools to play a more intentional secondary role in driving student success.

PLATFORMS SHOULD SERVE AS ENABLERS OF STUDENT SUCCESS

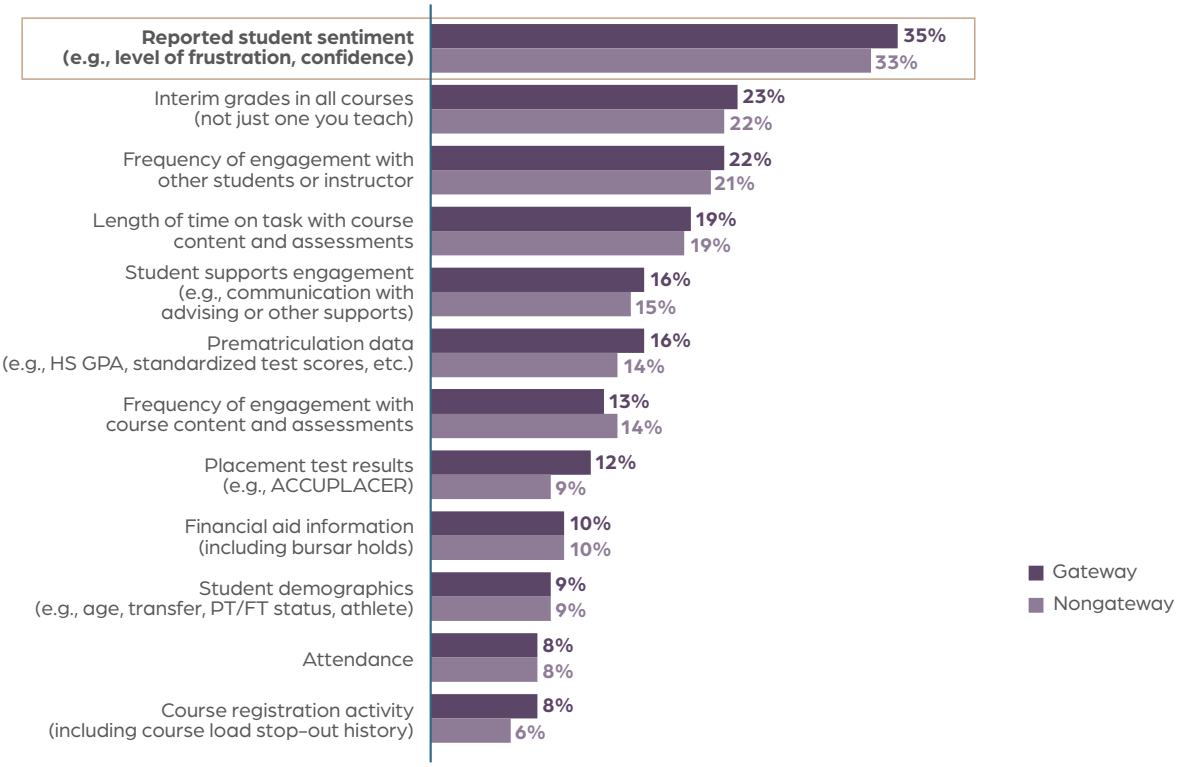
Instructional platforms are critical to course delivery, but their impact on student success beyond academic performance in a particular course depends on how well they support data-informed teaching and motivation-building strategies. Instructors continue to rely heavily on their own observations to assess engagement, missing opportunities to act on available platform data. Additionally, relying on personal observations creates room for bias as instructors perceive student engagement through a lens of their personal experience rather than being informed by holistic and objective data. Faculty and administrators seek to access more holistic data to keep students engaged in the classroom and drive retention.

High-quality digital course materials continue to play an integral role in supporting data access and pedagogy. Instructors indicate that sentiment and motivated-related data among students are highly valuable but the least accessible. This gap in access is particularly exacerbated among gateway course instructors. One-third of instructors cite that student sentiment data about their confidence levels would improve student outcomes despite it not being readily available (see Figure 12). Among introductory instructors, sentiment data is a higher priority than grades (35% vs 23%). Additionally, instructors indicate consistent usage of personal observations (46% of courseware users and 65% of primarily in-person instructors) to inform an understanding of student engagement. Due to a lack of available data and reliance on personal observation to fill the gap, there is an elevated risk of faculty bias in the perception of student experiences.

Figure 12:

Data not available to instructors that would help improve student outcomes*

Among introductory and nonintroductory instructors



Notes: **Survey question: "What student data is NOT currently readily available to you that would help you improve student learning in your courses? Select top three.", n=1,127 (Gateway), n=445 (Non-gateway); Data in chart(s) is weighted by institutional sector to reflect national representation*

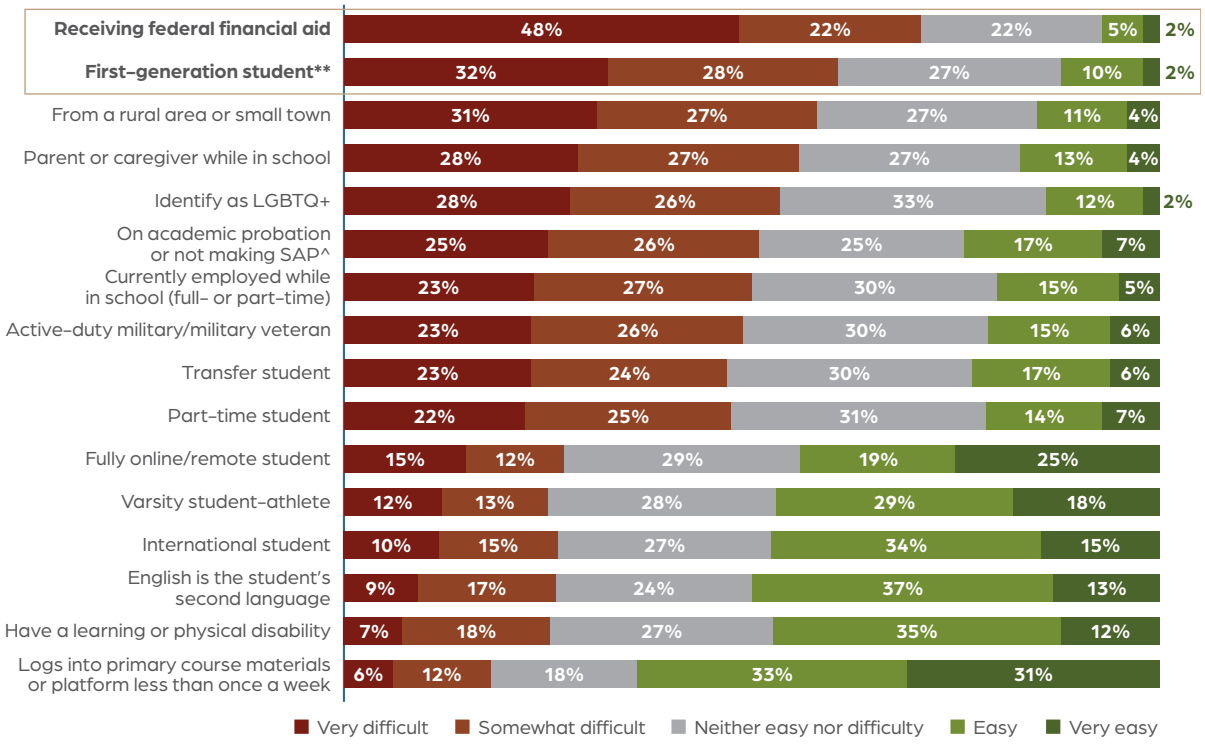
Sources: *Time for Class 2025 Surveys, Tyton Partners analysis*

There is also an opportunity for platforms to support instructors in understanding critical demographic characteristics. Notably, instructors find it most challenging to identify financial aid and first-generation status, two identifiers of historically under-supported students (see Figure 13). Faculty often serve as the first line of support for students and require holistic data on student experiences and demographics to connect them to appropriate services. With this information, faculty can assess when to step in or refer students to the right support resources.

Figure 13:

Instructor ease of identifying student characteristics*

Among all instructor respondents



Notes: **Survey question: "To what extent can you identify the following about your students? Please consider your course with the largest enrollment.", n=685; **First-generation is defined in the survey as students whose parent(s) did not complete a four-year college degree; ^SAP stands for "satisfactory academic progress"; Data in chart(s) is weighted by institutional sector to reflect national representation*

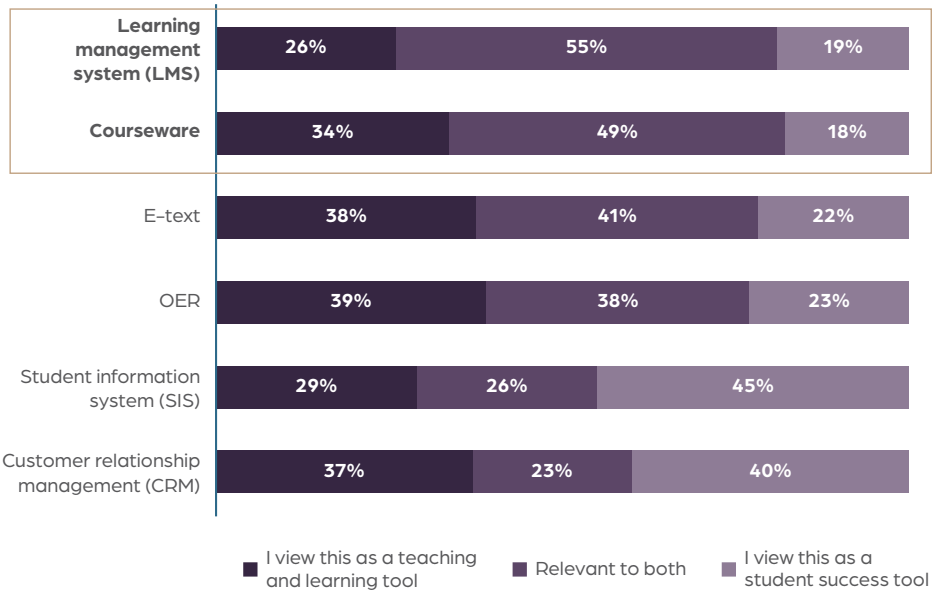
Sources: *Time for Class 2025 Surveys, Tyton Partners analysis*

Faculty interpretation of whether platform providers are student success tools, teaching and learning tools, or both informs how they use data in their courses (see Figure 14). Faculty perception varies across platform types. While instructors are open to using LMS as a student success tool (19% solely and 55% combined with teaching and learning), over one-third of instructors view digital course materials (courseware, e-text, or OER) solely as teaching and learning tools. Faculty who view platforms as student success tools also report greater ease in accessing important student demographic characteristics such as financial aid status, first-generation status, and whether they have a learning or physical disability.

Figure 14:

Instructor perception of platform use cases*

Among instructor respondents using respective tools



Instructors who **view courseware as a relevant student success tool** are more likely to say that identifying student characteristics** is easier on average (42%) compared to those who only view courseware as a teaching and learning tool (36%)

The same trend holds true for faculty views of LMS (41% vs. 35%)

Notes: **Survey question: "For each of the following instructional tool types, please indicate the column statement you agree with the most.", n=842; **Survey question: "To what extent can you identify the following about your students? Please consider your course with the largest enrollment."; Data in chart(s) is weighted by institutional sector to reflect national representation*

Sources: *Time for Class 2025 Surveys, Tyton Partners analysis*

Instructors who view courseware as supporting student success (either on its own or combined with teaching and learning) report significantly higher NPS (10) compared to those who see it solely as a teaching and learning tool (-5). In 2025, instructors continue to use courseware and LMS primarily for grading and content delivery, but many are missing the opportunity to leverage these platforms for early interventions and support. Platform providers can embed themselves as student success tools by providing actionable data and recommendations that prompt instructors to connect students to support services, and then tracking whether faculty and students have acted on that prompting.

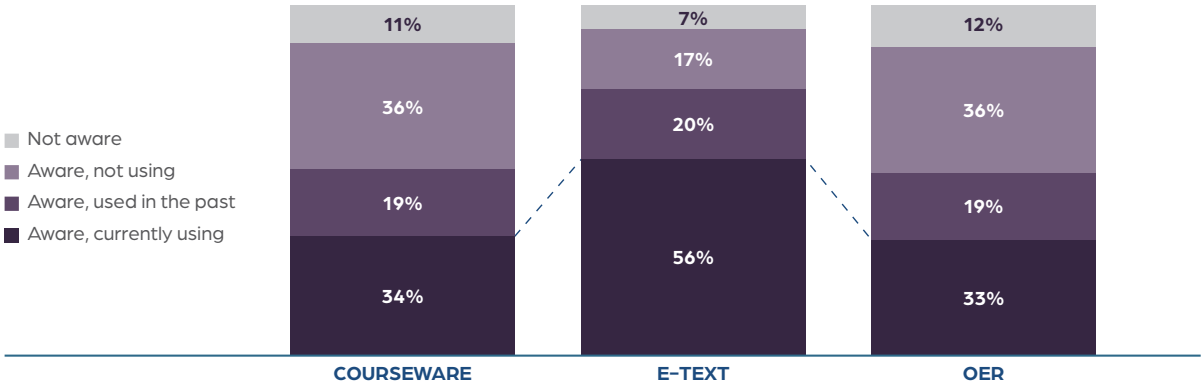
COURSE MATERIAL ADOPTION REMAINS STEADY OVER TIME

The strength of digital platforms as teaching and learning tools is reflected in healthy adoption across the course materials ecosystem. To deliver high-quality learning to enhance student engagement, most instructors use multiple types of digital course materials. As shown in Figure 15, e-texts are the most used material type (56%), followed by courseware (34%) and OER (33%). Adoption of digital course materials has remained steady over time, following a spike in usage in 2021. Instructors value the component parts of course material offerings, as reflected through consistent usage across all material types.

Figure 15:

Instructor awareness and use of core course materials*

Among all instructor respondents^



Adoption over time**	2019	2020	2021	2022	2023	2024
Adoption of courseware	24%^	38%	31%	38%	33%	37%
Adoption of e-text	n/a	n/a	69%	64%	60%	58%
Adoption of OER	34%	36%	41%	39%	36%	32%

Notes: **Survey question: "Please describe your level of awareness with and usage of the following: - courseware, e-text, OER = Aware and currently use in my courses" Instructor n=1,572; **"Adoption" refers to number of respondents who selected "Aware, currently using" for courseware, e-text, and OER; ^2019 data is among introductory instructors only; 2025 data in chart(s) is weighted by institutional sector to reflect national representation*

Sources: *Time for Class 2019-2025 Surveys, Tyton Partners analysis*

Course materials are rarely adopted alone, with the combined use of materials remaining steady over time (see Figure 16a). Notably, 18% of faculty report using both courseware and e-text, while 11% report using all three material types, reflecting growing flexibility in instructional content strategies. Combining products allows faculty to take on a variety of use cases, likely driving the increase in satisfaction with course materials among those using multiple material types. With cost-saving considerations likely in play, OER adoption is higher among public, two-year institutions (15% alone, 33% in combination), while sole e-text (21%) and courseware (6%) usage is highest among private, four-year institutions (see Figure 16b).

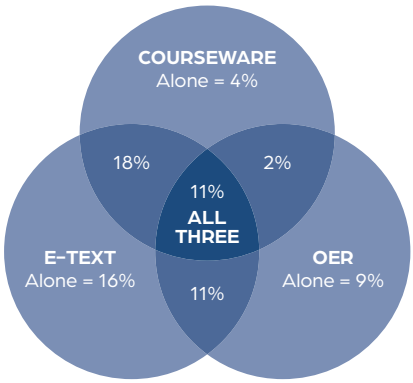
Figure 16a:

Usage matrix of core course materials 2025

Among all instructor respondents

Use of courseware, e-text, and OER together increases NPS of e-text

Users of courseware, e-text, and OER indicate higher NPS for e-text (NPS=17 in '25) compared to users of only one or two offerings*



When asked to **compare courseware and OER** in terms of student learning outcomes, faculty indicate the course materials are **close equivalents**, on average**

	2021	2022	2023	2024	2025
Usage of courseware alone	4%	5%	4%	5%	4%
Usage of courseware + e-text	14%	19%	16%	19%	18%
Usage of all three course materials	12%	24%	11%	11%	11%

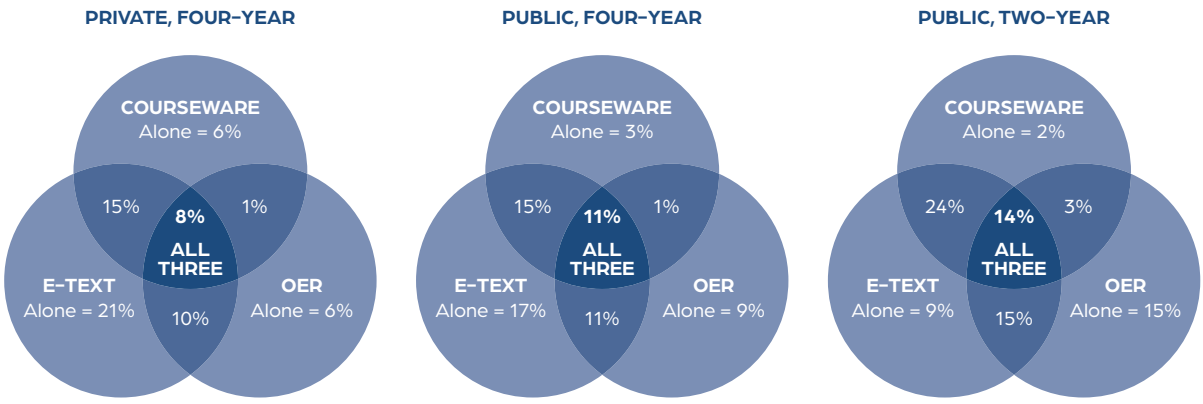
Notes: **Survey question: "Please describe your level of awareness with and usage of the following: courseware, e-text, OER = Aware and currently use in my courses"; n=2,894 (2021), n=2,735 (2022), n=1,748 (2023), n=1,824 (2024), n = 1,572 (2025); *Users of just courseware indicate an NPS of 6 in '23 for courseware. Users of e-text and courseware indicate an NPS of 6 in '23 for courseware. Users of just e-text indicate an NPS of -23 in '25 for e-text. Users of both e-text and courseware indicate an NPS of -5 in '25 for e-text; **Survey question: "Please place yourself along the spectrum below with regard to your perspective on OER (open education resources, in the public domain at no cost) and courseware.", n=598; 2025 data in chart(s) is weighted by institutional sector to reflect national representation*

Sources: *Time for Class 2021-2025 Surveys, Tyton Partners analysis*

Figure 16b:

Usage matrix of core course materials 2025*

Among all instructor respondents, by institution sector



Notes: **Survey question: "Please describe your level of awareness with and usage of the following: courseware, e-text, OER = Aware and currently use in my courses"; n=402 (Private four-year), n=842 (Public four-year), n=234 (Public two-year). Data in chart(s) is weighted by institutional sector to reflect national representation*

Sources: *Time for Class 2025 Surveys, Tyton Partners analysis*

FULL COURSEWARE BENEFITS UNLOCKED AFTER THE THIRD TERM

For courseware users in particular, the third term of usage is an important turning point among faculty for driving satisfaction and sophistication (see Figure 17). Experienced users reap the full benefits of courseware as they experiment and become familiar with features and time-saving functionalities.

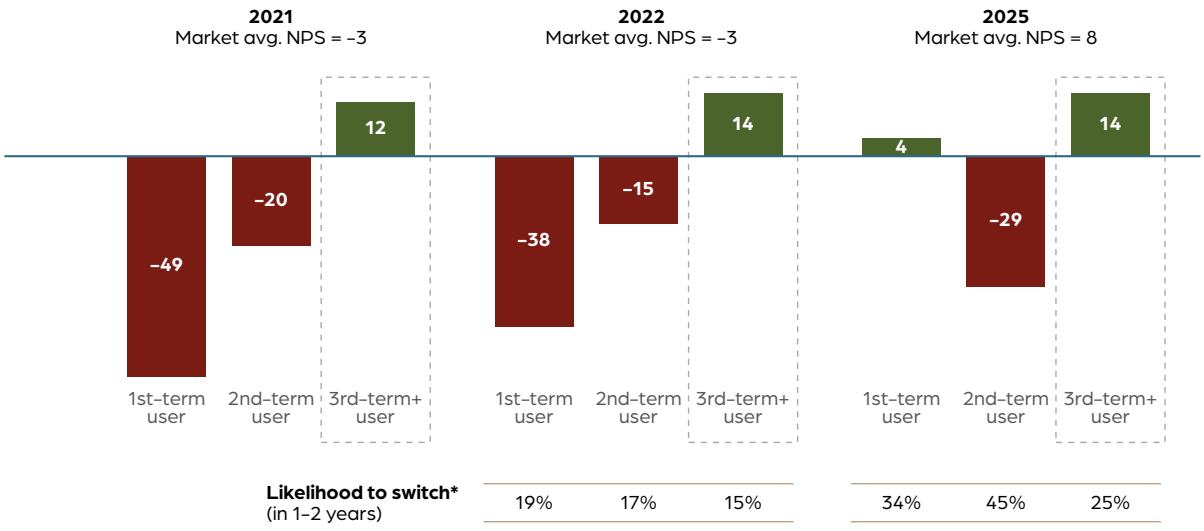
Instructors typically aren't promoters of courseware until their third term using the product (-25 on average as new users vs. 13 on average after their third term), suggesting that instructors who use a courseware product for longer tend to be more satisfied. Furthermore, market average satisfaction has steadily improved in recent years (from -3 in 2021 to 8 in 2025), indicating that providers are better meeting instructor needs. Providers can further improve faculty experience and student outcomes by guiding new users to the most impactful features early on, such as grading tools, adaptive content, and data dashboards. Guiding faculty toward data indicators on persistence and motivation also presents an opportunity for platform providers to establish themselves early on as student success enablers.

Longer-term users are also bringing together multiple course material types to customize their syllabus to student learning needs. Novice (one- or two-term) users typically start out only using courseware without other course material types, and as they become more comfortable, they are more likely to combine with other material types (9% of experienced (three-or-more-term) users use only courseware).

Figure 17:

Faculty NPS scores for courseware, by terms of courseware experience

Among all instructor respondents



Notes: **Likelihood to switch was not asked in the Time for Class 2021 survey; 2022 version of the question asked likelihood to switch within the year; 2025 data in charts is weighted to reflect institutional representation*

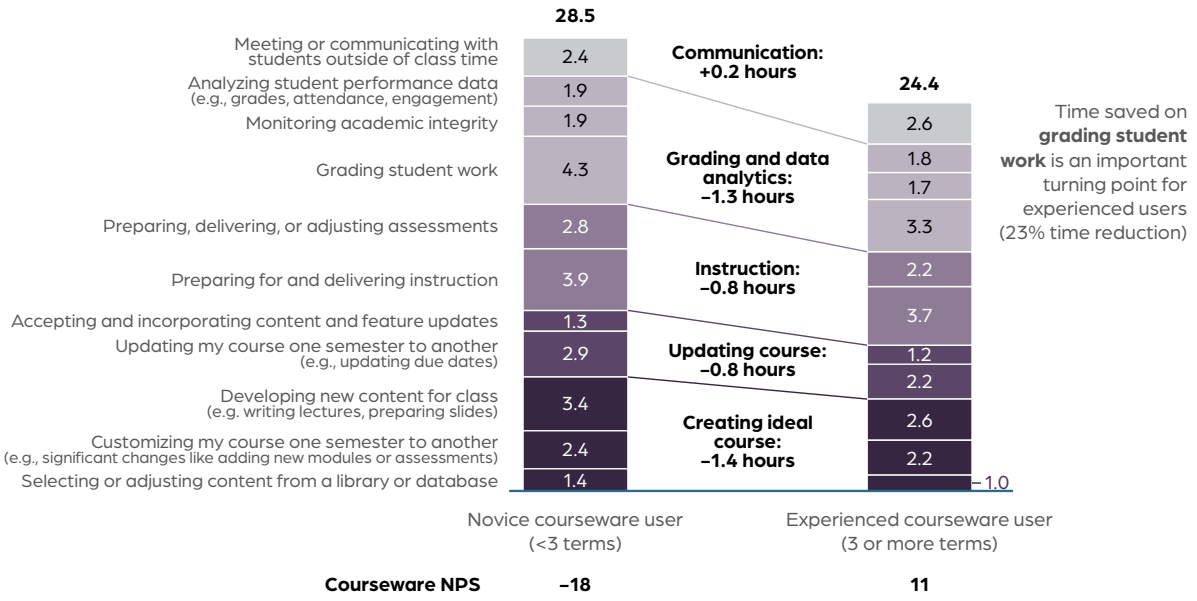
Sources: *Time for Class 2021, 2022, and 2025 Surveys, Tyton Partners analysis*

Increased courseware satisfaction among mature users is highlighted through significant time saving across grading, data analysis, and course-creation activities. Novice courseware users spend more time across teaching and learning activities (28.5 hours, on average) compared to experienced users, who spend 24.4 hours (see Figure 18). Improved familiarity with courseware platforms manifests as decreased time spent on grading and data analytics (-1.3 hours) and course creation (-1.4 hours) use cases, making up over two-thirds of the time reduced.

Figure 18:

Instructor hours spent per week among teaching-and-learning-related activities across activities in largest courseware course* **

Among all instructor respondents



Notes: **Survey question: "On average, how many hours do you allocate each week for each of the following activities in the highest enrollment course in which you use courseware?"; **Activities not shown include "Conducting my own research," "Advising students on academic and/or personal needs," "Advising students on exploring career interests including research and internships," "Answering students' IT or technical questions," and "Other, please specify"*

Sources: *Time for Class 2025 Surveys, Tyton Partners analysis*

As supporting student success becomes a top need for institutions to drive engagement and retention, embedding relevant features within course material platforms is of increasing importance. Availability of such features should be clear to instructors from day one of adoption, as opposed to allowing users to familiarize themselves with the platform over multiple terms of usage. For courseware users to see the full benefits of the platform, they must experience the efficiencies that embedded functions provide. Course material platform providers have the opportunity to fast-track users toward a better experience and higher satisfaction by conducting early onboarding to the features that drive the most instructor efficiencies, namely, course development as well as grading and data analytics.

LOOKING FORWARD

Higher education stands at a pivotal moment, with institutions navigating developments in technology and student expectations while solving for existential threats, including the demographic cliff and declining funding. These forces are actively reshaping how institutions approach teaching, learning, and student success. The next section highlights several emerging trends to watch in the near term, including the rise of generative AI, expanding demand for career-connected pathways, accessibility regulations, and changing approaches to course material access.

READING, WRITING, ARITHMETIC—AND AI: THE NEXT ESSENTIAL LITERACY FOR STUDENTS

Generative AI has the potential to be a meaningful asset in higher education, offering new ways to support both instructional efficiency and student learning. Usage has increased significantly, with 40% of administrators, 30% of instructors, and 42% of students now using GenAI tools on a daily or weekly basis (see Figure 7). Although many instructors still associate GenAI with increased workloads, especially due to time spent monitoring for cheating or redesigning assessments, those who use it daily are more likely to report decreased workloads and more proactive teaching practices (see Figure 9).

On the ground, institutions are making moves to instruct administrators, faculty, and students on AI best practices. For example, the City University of New York is supporting instructors in developing course guidelines on leveraging AI.[8] Other institutions have developed AI-focused programs, such as the AI Across the Curriculum initiative at the University of Florida[9] or the Davis Institute for Artificial Intelligence at Colby College.[10]

Metrics of success are also shifting. While just 4% of institutions currently measure student literacy in GenAI, nearly one-third (39%) expect to do so within the next three years (see Figure 19). This signals an important opportunity for institutions to move from casual experimentation to thoughtful integration that prepares students for a future shaped by artificial intelligence. Institutions should seek to implement AI policies that fit their students' unique needs and circumstances, with a focus on starting from a foundation of trust and working toward measured learning and AI literacy outcomes. Furthermore, this moment of experimentation presents an opportunity for solution providers to measure student AI literacy through digital platforms to support progress against new metrics.

8. ***Inside Higher Education***
9. ***University of Florida: Artificial Intelligence Initiative***
10. ***Colby College: Davis Institute for Artificial Intelligence***

Here are a few examples of GenAI literacy:

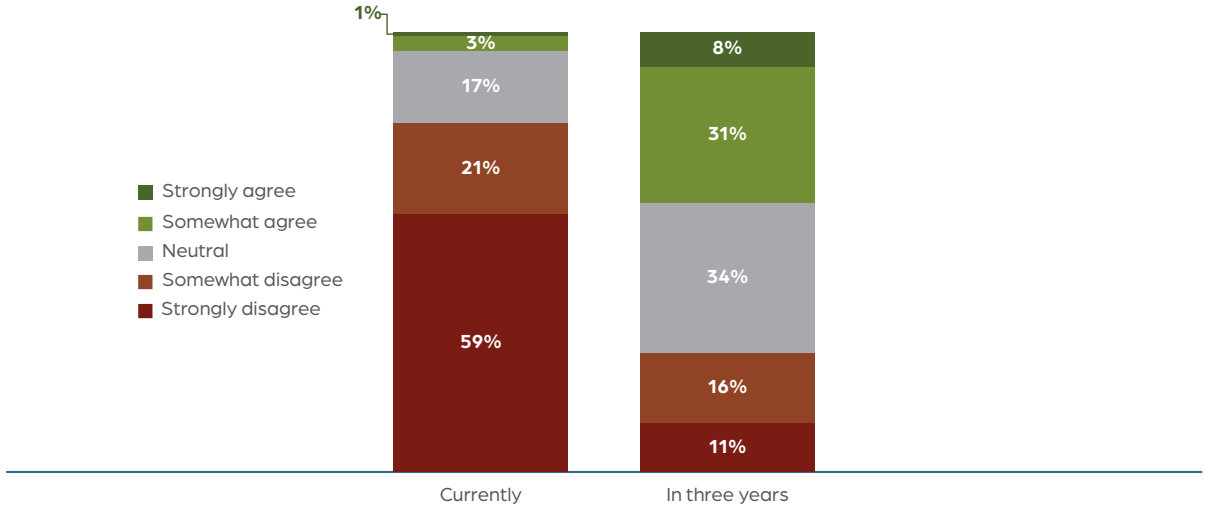
- Knowing how to effectively prompt generative AI tools to get desired outputs
- Leveraging the tools in compliance with institutional, departmental, and class-level policies
- Understanding the limitations of generative AI tools (e.g., hallucinations)

> *"In preparing students for an AI-infused world, the most common way in which instructors reported integrating these tools into student coursework was through AI literacy-oriented activities, which is to say, activities in which the instructor has students use generative AI with the* ***objective of increasing students' familiarity with and understanding of the tools' capabilities and limitations****."*
> *– Claire Baytas and Dylan Ruediger, authors of "Making AI Generative for Higher Education: Adoption and Challenges Among Instructors and Researchers" (May 2025)*

Figure 19:

Administrator indication of student literacy of GenAI as a measured learning outcome*

Among all administrator respondents



Notes: **Survey question: "To what extent do you agree with the following statement? Student literacy of generative AI tools (i.e., awareness of, knowledge of, and proficiency in using) is a measured learning outcome at my institution.", n=304; Data in chart(s) is weighted by institutional sector to reflect national representation*

Sources: *Time for Class 2025 Surveys, Tyton Partners analysis*

BUILDING STUDENT ENGAGEMENT THROUGH CAREER-ALIGNED LEARNING

Students are signaling a desire for learning experiences that are closely aligned with career advancement. Such sentiment was reflected through two markers: demand for competency-based learning and nondegree credentials. A large majority (89% of students) express interest in nondegree credentials that can be earned alongside traditional degrees (see Figure 20).

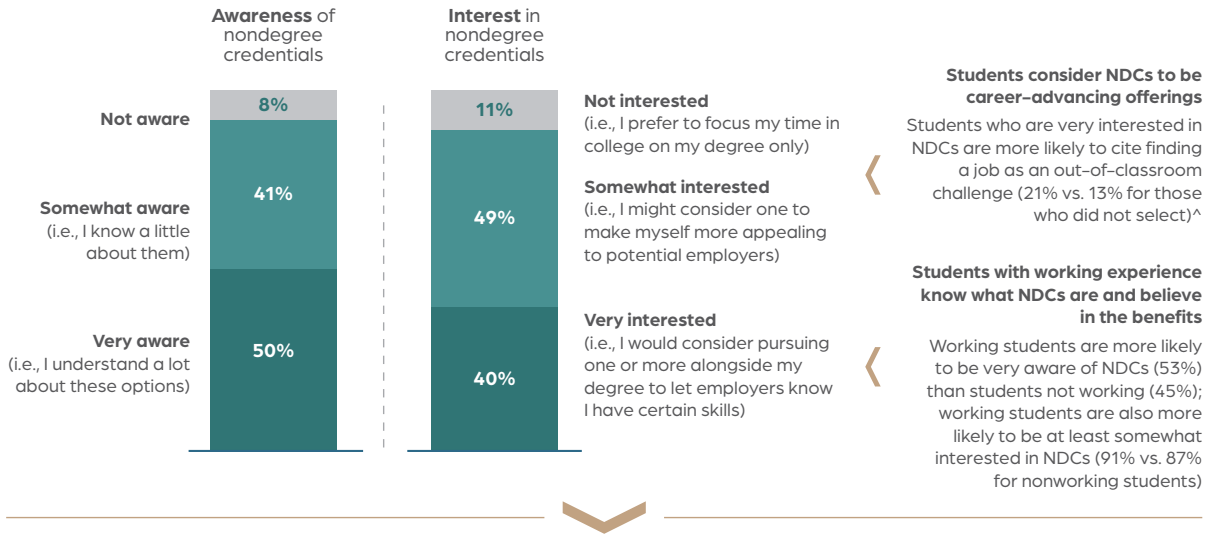
Implementing competency-based learning is one approach to ensure that faculty are tracking and signaling to students the concrete skills they are developing in class. However, institutional offerings are not keeping pace. Only 2% of colleges and universities have implemented competency-based learning across all departments, and most (54%) have limited it to individual courses or select programs (see Figure 21). Telling students how classroom learning connects to tangible, career-aligned skills is an important approach for keeping them motivated to persist.

Student interest in a career-advancing higher education experience is being reflected through the 2025 Carnegie Classification,[11] which has shifted toward multidimensional categories representative of the current breadth of degrees and certifications in higher education. Teaching and learning platform providers have an opportunity to support faculty in modularizing their courses to embed more skills-based credentialing over the course of a term, with the potential to drive improved student engagement and satisfaction along the way.

Figure 20:

Student awareness of and interest in nondegree credentials (NDCs)* **

Among all student respondents



Platform providers have an opportunity to support faculty in modularizing their courses to enable skills–based credentials as a component of course offerings, given student demand

Notes: **Survey question: How aware are you of nondegree credentials (e.g., certificates, microcredentials, industry certifications, digital badges) as a supplement to a traditional degree/credits? Select one., n=1,528; **Survey question: "How interested are you in nondegree credentials (e.g., certificates, microcredentials, industry certifications, digital badges) as a supplement to a traditional degree/credits? Select one.", n=1,528; ^Survey question: "What was most challenging for you out of the classroom this past term? Select top three."; Data in chart(s) is weighted by institutional sector to reflect national representation*

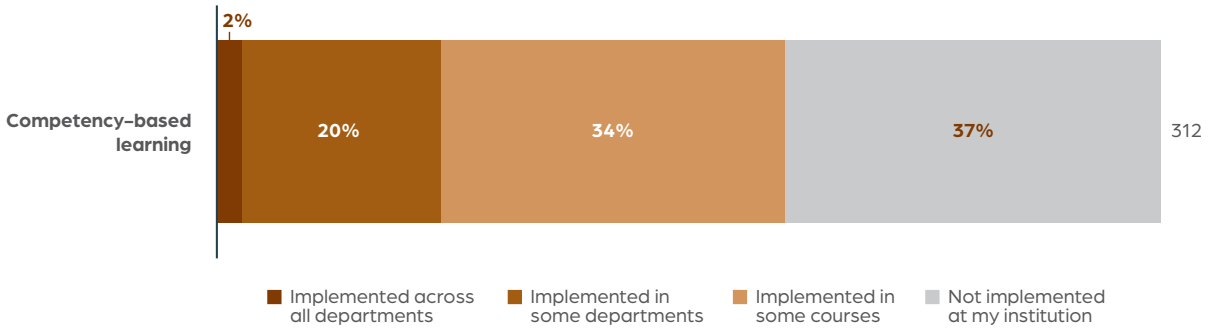
Sources: *Listening to Learners 2025, Tyton Partners analysis*

11. ***Carnegie Classification of Institutions of Higher Education***

Figure 21:

Adoption of competency-based learning*

Among all administrator respondents



Notes: **Survey question: "This question explores your institution's focus on outcomes-driven skill development versus traditional grading structures. Please refer to the definitions when answering: Competency-based education (CBE) shifts the focus from time spent in a course (seat time) to demonstrated knowledge and skills. Students progress by proving mastery rather than following a fixed schedule. Where is your institution on a spectrum of exploring either of these approaches to undergraduate education?"; Data in chart(s) is weighted by institutional sector to reflect national representation*

Sources: *Time for Class 2025 Surveys, Tyton Partners analysis*

2026 COMPLIANCE ALERT: ACCESSIBILITY STANDARD CHANGES WILL REQUIRE PROCUREMENT PROCESS UPDATES

As institutions look to holistically serve all student needs, they will need to prepare for upcoming changes to federal regulations on accessibility standards. In the current state, compliance with the latest WCAG 2.1 Level AA standards is the technical standard for accessibility. However, the Department of Justice has made WCAG 2.1 Level AA compliance required for government entities and third-party services, a rule that is taking effect in April 2026 or 2027, depending on the size of the municipality in which an institution is located.[12] Even with the ruling taking effect soon, 69% of administrators and 72% of instructors are unaware of these changes to WCAG 2.1 AA (see Figure 22).

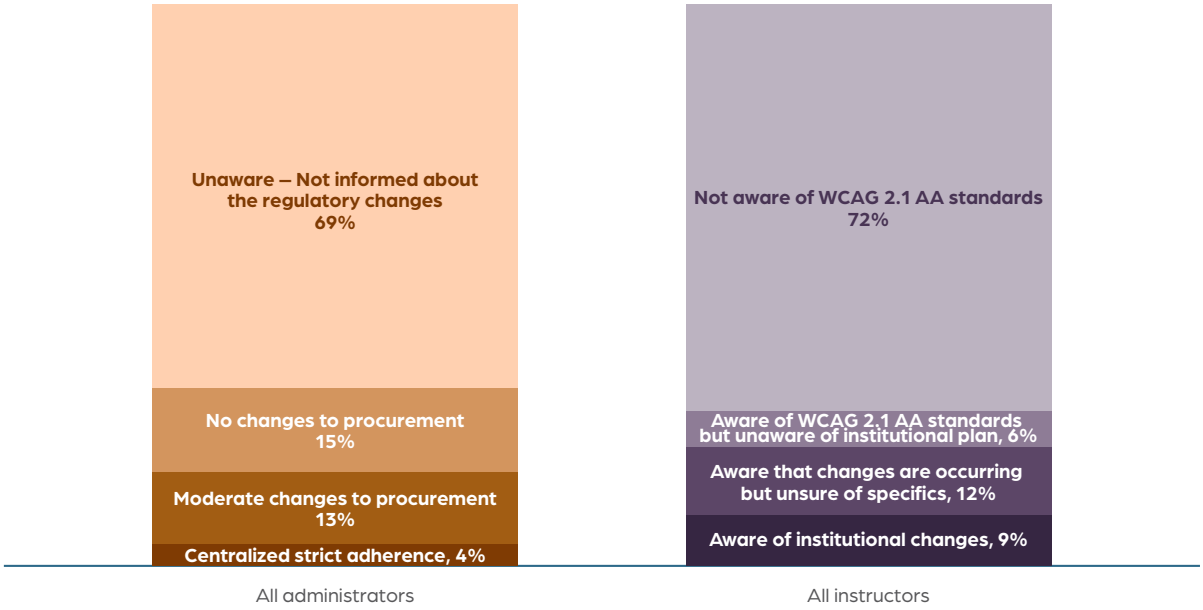
Institutions must be informed of the accessibility standards before the requirements take place in order to prepare for audits and procurements resulting from the shift. Third-party providers have an important role to play in proactively evolving their digital materials to meet standards. In particular, codesigning solutions with students who have disabilities is one method to ensure that products meet federal requirements while improving user experience for all.

12. ***United States Department of Justice Civil Rights Division***

Figure 22:

Administrator and instructor awareness of WCAG 2.1 AA accessibility standards* **

Among all administrator and instructor respondents



Notes: **Survey question: "What is your planned action with the upcoming WCAG 2.1 AA regulatory changes with respect to primary course materials (e.g., courseware, e-Text, OER)?", Administrator n=302; **Survey question: "What is your level of awareness of whether your institution is making changes to primary course material selection, adoption, and usage processes to be compliant with upcoming regulatory changes around WCAG 2.1 AA standards?", Instructor n=1,572; Data in chart(s) is weighted by institutional sector to reflect national representation*

Sources: *Time for Class 2025 Surveys, Tyton Partners analysis*

POTENTIAL IMPROVEMENTS TO DAY-ONE ACCESS BENEFITS AS IA/EA MODELS EVOLVE

Core to student success from the outset of the semester is access to the right course materials. Under traditional access models, institutions have continuously struggled to achieve 100% student adoption of required materials. This year, we see strong adoption of inclusive- and equitable-access models as methods for driving down student costs and increasing day-one access to the right materials (see Figures 23 and 24). In 2024, 87% of instructors surveyed who implemented an inclusive-access model indicated that 75%+ of their students had day-one access to course materials, compared to 61% of instructors using a traditional course materials access model.[13] Student satisfaction with these models is also growing with a 21pp increase in preference for inclusive access and 26pp increase in equitable access over the past three years (see Figure 25).

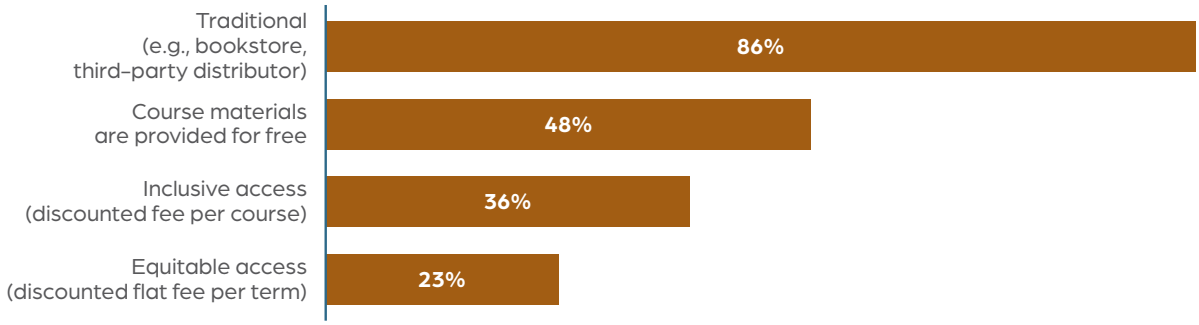
Although adoption and satisfaction are steady across inclusive- and equitable-access models, there is uncertainty that opt-out affordable-access models will remain the default setting for students. Under the opt-out model, students are given the option to "opt out" of course materials access in favor of finding materials on their own. This model ensures that more students have access to their materials on the first day of class. In the field, North Carolina Agricultural and Technical State University implemented an opt-out

13. Tyton Partners "***Course Materials in Higher Education: How Affordable-Access Programs Save Students Money and Produce Positive Learning Outcomes***"

equitable-access model to replace the traditional access model in 2021, with over 98% of students receiving day-one access to course materials postimplementation; before the implementation of this program, 30-40% of students did not buy course materials from the campus bookstore, indicating a significant increase in day-one course material access.[14] Shifting away from an opt-out access model would have implications for the day-one access benefit that drives affordable-access models, impacting student success (see Figure 26).

Figure 23:

Course material access models used at institution according to administrators*

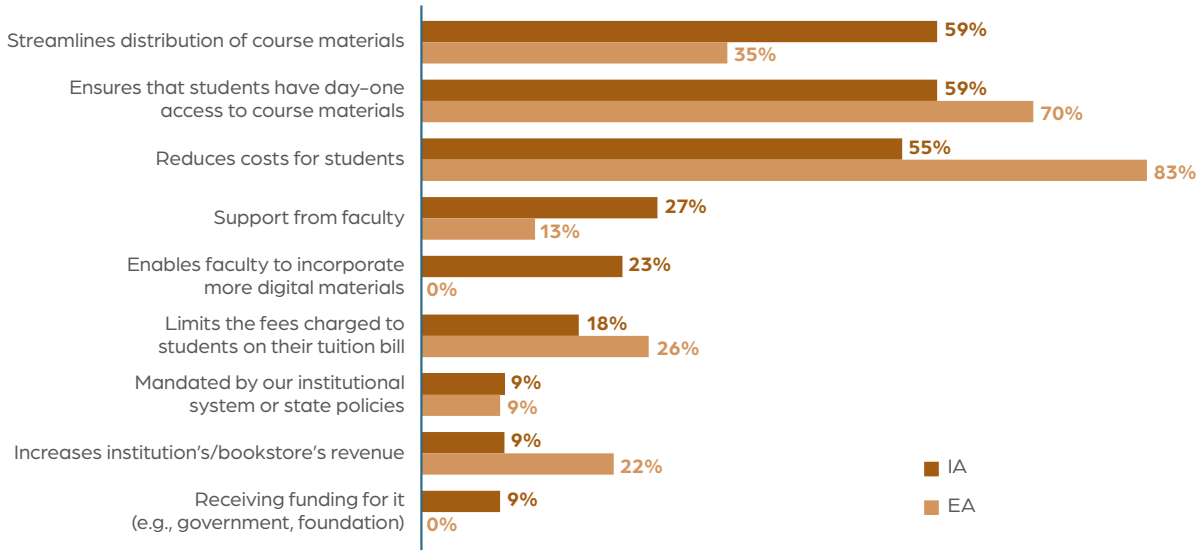


Notes: **Survey question: "What are the course material access models offered to students at your institution? Select all that apply.", n=277; Data in chart(s) is weighted by institutional sector to reflect national representation*

Sources: *Time for Class 2025 Surveys, Tyton Partners analysis*

Figure 24:

Top reasons for using affordable access models according to administrators*



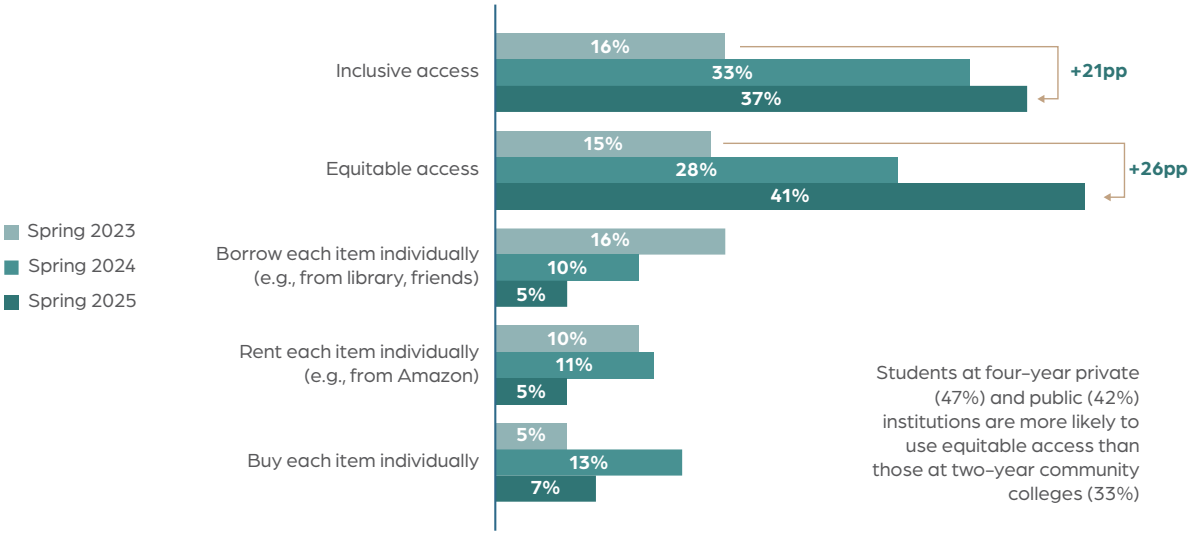
Notes: **Survey question: "What are the primary reasons your institution uses [inclusive access (discounted fee per course)/equitable access (discounted flat fee per term for all courses)]? Select top three.", n=22 (IA), n=23 (EA). Data in chart(s) is weighted by institutional sector to reflect national representation*

Sources: *Time for Class 2025 Surveys, Tyton Partners analysis*

14. Tyton Partners "***Course Materials in Higher Education: How Affordable-Access Programs Save Students Money and Produce Positive Learning Outcomes***"

Figure 25:

Student preference for accessing digital course materials*

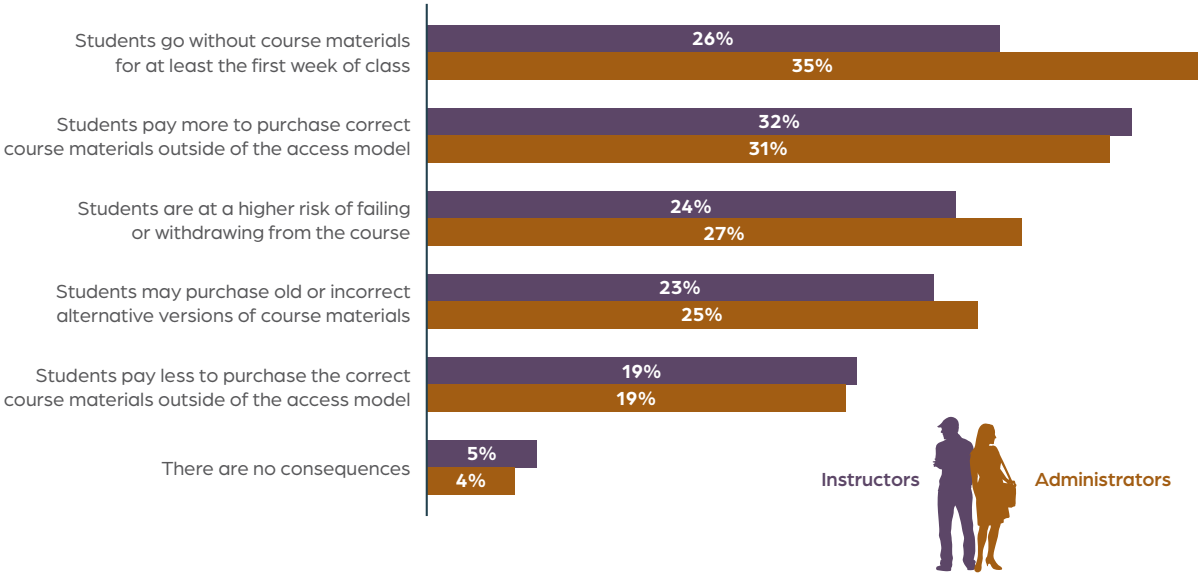


Notes: **Survey question: "What best describes how you would most prefer to acquire digital course materials? Select only one." Student n=1,014*

Sources: *Time for Class 2023-2025 Surveys, Listening to Learners 2025, Tyton Partners analysis*

Figure 26:

Consequences of opting out of IA/EA according to instructors and administrators*



Notes: **Survey question: "What are the typical consequences (if any) when students opt out of inclusive or equitable access for a course? Select all that apply."; Administrator n=48, Instructor n=329. Data in chart(s) is weighted by institutional sector to reflect national representation*

Sources: *Time for Class 2025 Surveys, Tyton Partners analysis*

CONCLUSION

As institutions navigate the evolving digital learning landscape, the original promise of expanding access to course materials must be matched with a renewed focus on expanding access to student supports. Instructors and students are calling for more human-centered interactions, driven by persistent challenges such as weak study habits, low motivation, and academic integrity concerns in a GenAI-complicated environment. With respect to realizing the benefits of increased flexibility through digital learning, there must be a balance between implementing digital learning to bolster learning access and investing in support services.

Digital learning must now extend beyond the classroom to support the full student journey. Platforms should equip instructors with timely, actionable insights that enable personalized interventions. This support should not only address academic needs but also help prepare students for career success. As GenAI becomes more embedded in the workforce, institutions have a growing responsibility to enhance students' literacy of these tools. At the same time, strong student interest in nondegree credentials reflects a desire for more flexible, skills-based pathways. In addition to enhancing personalized learning (e.g., adaptive learning) and increasing the flexibility of learning delivery (e.g., hybrid and fully online learning), digital learning has enabled students to access more dynamic course materials in more formats. Now, we need to leverage it to broaden access to student supports, both in the classroom and beyond.

ABOUT THE SURVEY

Time for Class is Tyton Partners' longitudinal study of digital learning in US higher education. The 2025 survey was conducted in spring 2025 and includes responses from the following:

- Over 1,500 students
- Over 1,500 instructors
- Over 300 administrators

The study focuses on introductory and developmental courses, where student attrition is highest and the impact of digital tools is most pronounced. Survey questions addressed preferences in modality, instructional challenges, GenAI usage, data access, and platform perceptions.

We used GPT-4o (OpenAI) to refine sentence structure and improve clarity during manuscript preparation. The authors verified all content to ensure accuracy.

APPENDIX: DEMOGRAPHIC DETAIL

Time for Class (T4C) 2025 is a series of national, longitudinal surveys of over 3,000 higher education administrators, instructors, and students. The survey is designed to measure the evolving nature of digital teaching and learning at higher education institutions across the United States to increase affordability, accessibility, and equity for students.

In February and March of 2025, administrators, instructors, and students received online surveys ranging from approximately 15 minutes to just under an hour, depending on their individual roles. We collected responses from approximately 300 administrators and 1,500 instructors at over 900 unique postsecondary institutions, as well as approximately 1,500 students from two- and four-year private and public institutions.

Figure 27:

Overview of national surveys fielded in spring 2025

		ADMINISTRATOR SURVEY	INSTRUCTOR SURVEY	FOUR-YEAR STUDENT SURVEY (currently enrolled)	COMMUNITY COLLEGE STUDENT SURVEY (currently enrolled)
QUALIFIED COMPLETES	T4C '25	312	1,572	1,038	403
Time to complete	T4C '25	33 minutes	57 minutes	17 minutes	19 minutes

The 2025 student survey also contains combined insights from 87 current dually-enrolled students, bringing the total student respondent count to 1,528

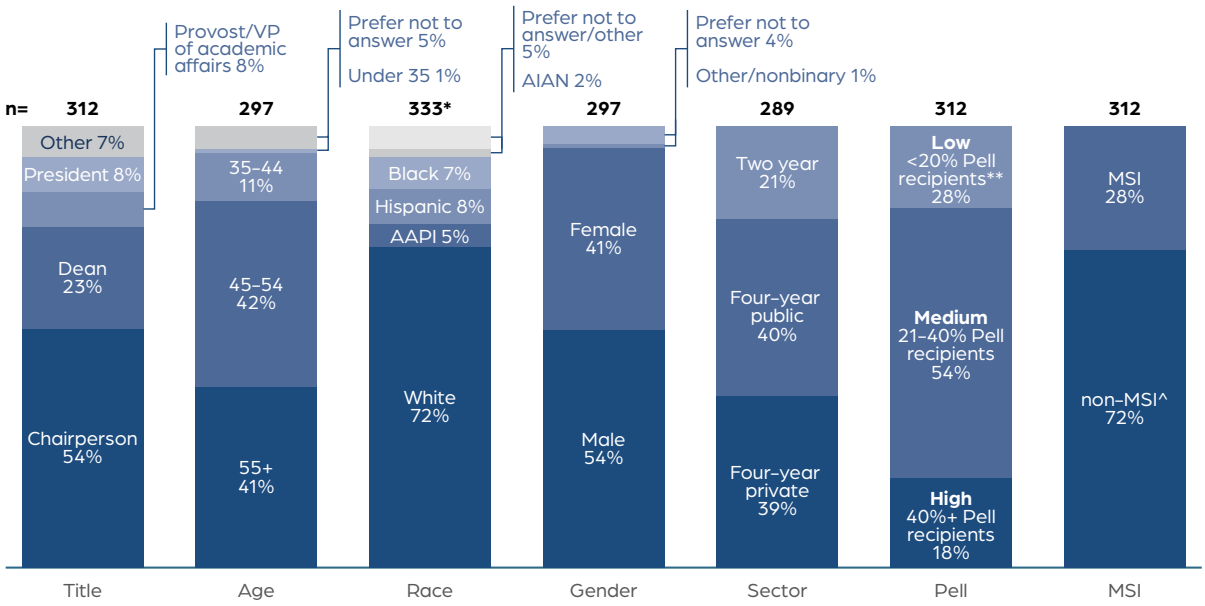
Sources: *Time for Class 2023-2025 Surveys*

This year's survey has gathered survey responses from a representative set of administrators, instructors, and students nationwide, reflecting region, age, race, gender, and other collected demographic information. Because not all questions were presented to every respondent, response numbers vary by segment. Due to rounding, percentages may equal slightly more or less than 100%. Faculty and administrator data in figures throughout this report were weighted by institutional sector to reflect national representation.

Figure 28:

Demographics detail overview of survey respondents

Among all administrator respondents



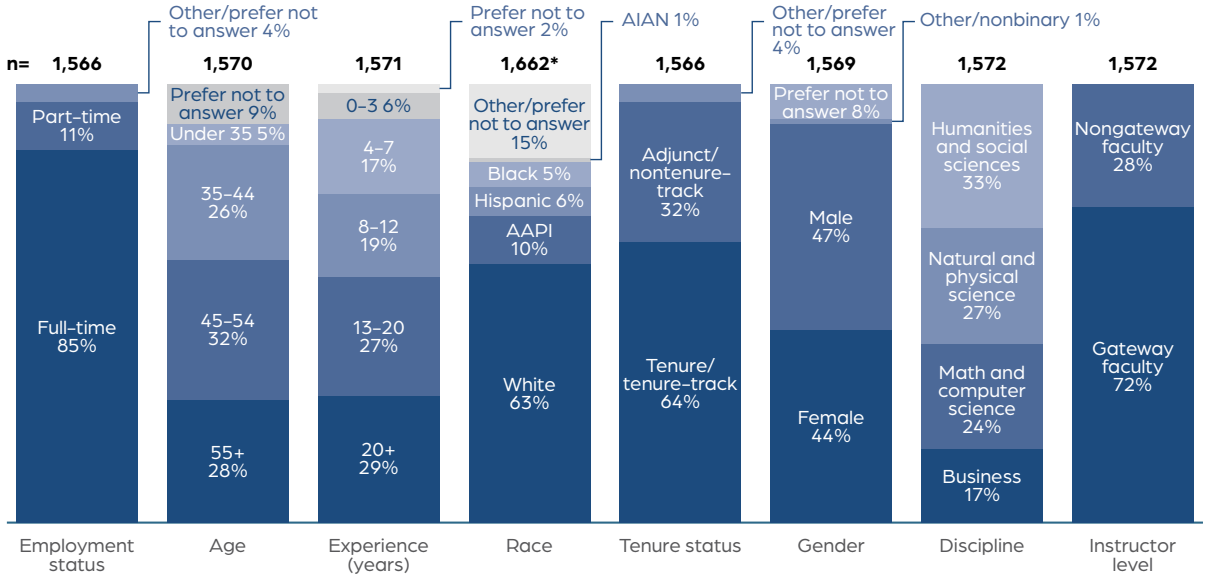
Notes: **Number exceeds total n because respondents could select more than one option, AIAN stands for American Indian/Alaskan Native background, AAPI stands for Asian American or Pacific Islander background; **Includes those without sufficient data (24 respondents); ^Includes those without sufficient data (22 respondents)*

Sources: *Time for Class Administrator Survey 2025, NCES, Tyton Partners analysis*

Figure 29:

Demographics detail overview of survey respondents

Among all instructor respondents



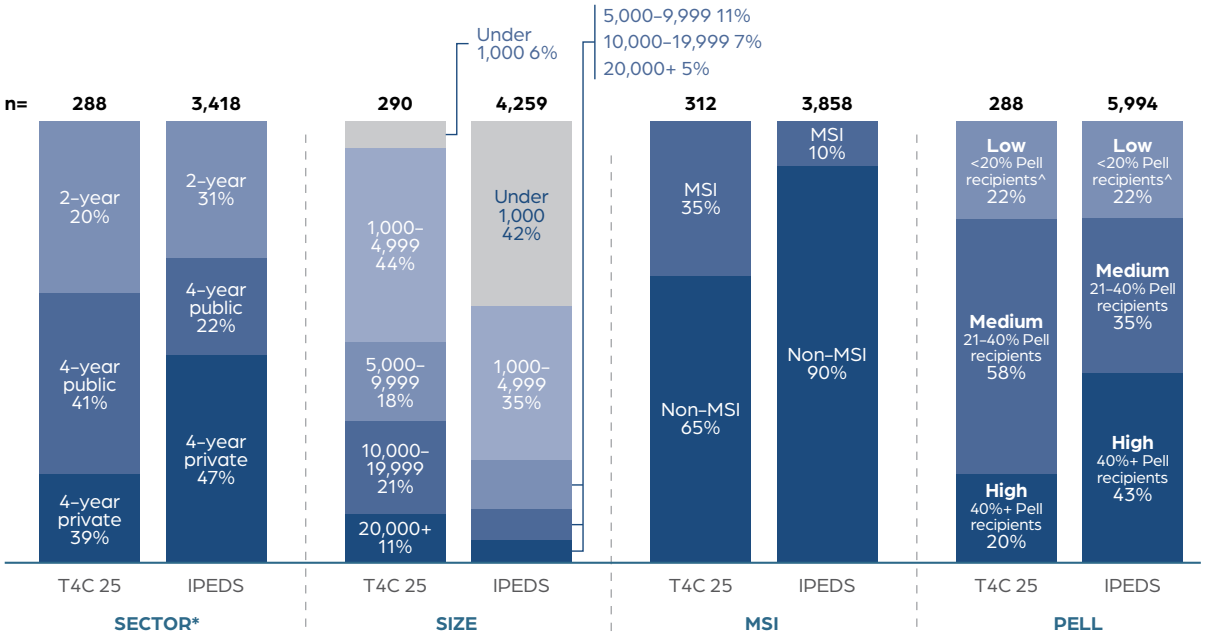
Notes: **Number exceeds total n because respondents could select more than one option, AIAN stands for American Indian/Alaskan Native background, AAPI stands for Asian American or Pacific Islander background*

Sources: *Time for Class Instructor Survey 2025, NCES, Tyton Partners analysis*

Figure 30:

Comparison of administrator institutions and IPEDS distribution

Among all administrator respondents



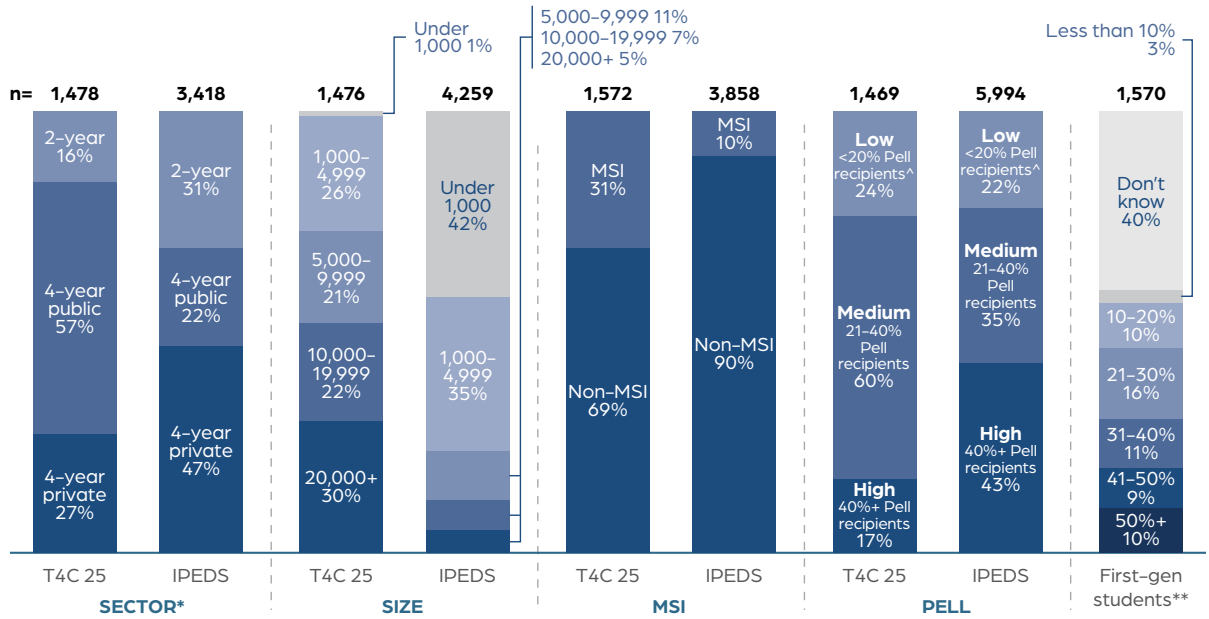
Notes: **Two-year includes private and public institutions; ^Includes respondents and institutions who did not report Pell Grant data. Administrator data throughout this report have been weighted based on institution sector to reflect national representation*

Sources: *Time for Class Administrator Survey 2025, NCES, Tyton Partners analysis*

Figure 31:

Comparison of instructor institutions and IPEDS distribution

Among all instructor respondents

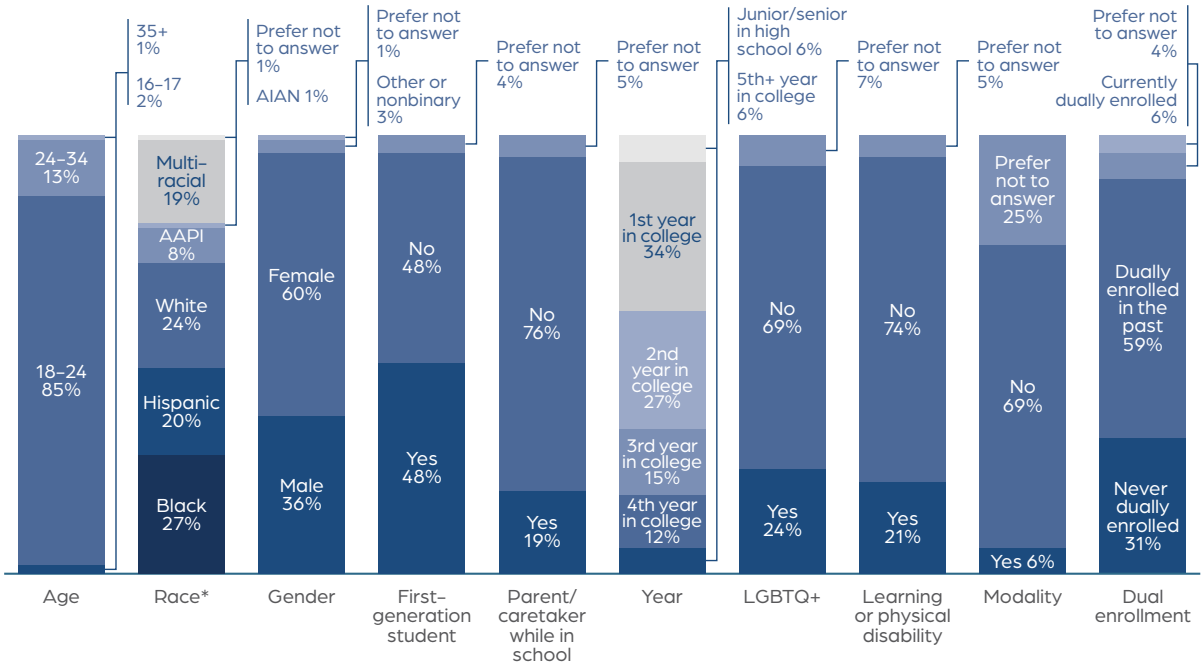


Notes: **Two-year includes private and public institutions; **IPEDS does not track first-generation status; ^Includes respondents and institutions who did not report Pell Grant data. Instructor data throughout this report have been weighted based on institution sector to reflect national representation*

Sources: *Time for Class Instructor Survey 2025, NCES, Tyton Partners analysis*

Figure 32:

Listening to Learners 2025 student survey respondent characteristics (1/2)

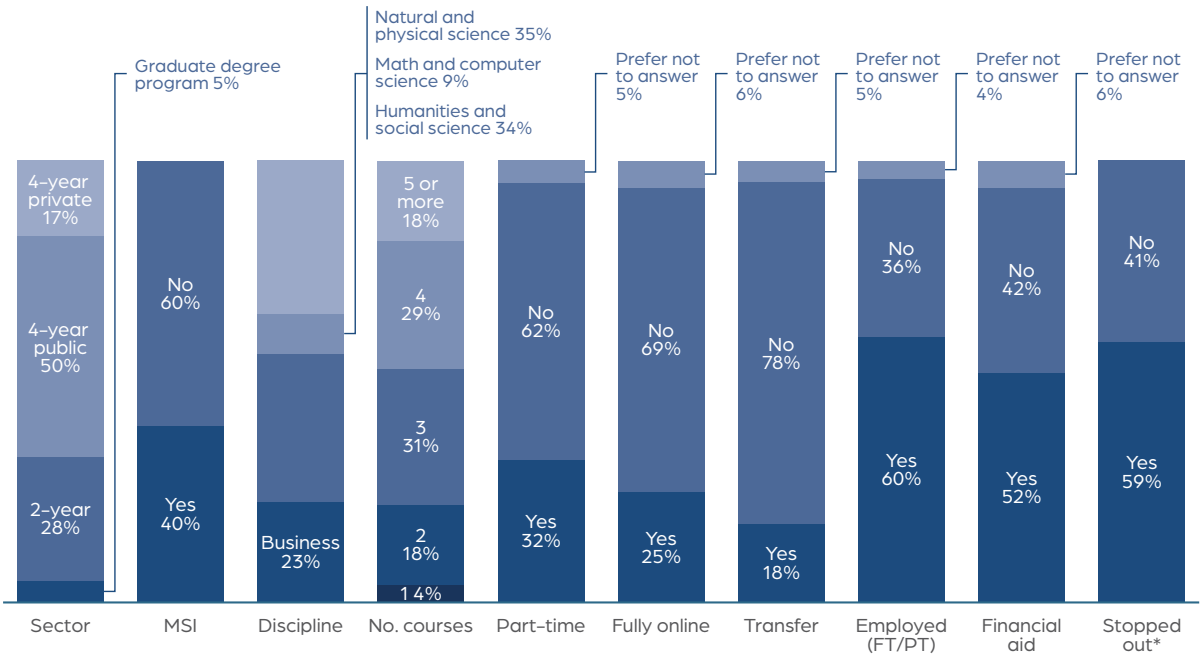


Notes: **AIAN stands for American Indian/Alaskan Native background, AAPI stands for Asian American or Pacific Islander background*

Sources: *Listening to Learners 2025, Tyton Partners analysis*

Figure 33:

Listening to Learners 2025 student survey respondent characteristics (2/2)



Notes: **Students who have ever taken an enrollment break between their first year of college and today*

Sources: *Listening to Learners 2025, Tyton Partners analysis*

ACKNOWLEDGMENTS

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We extend our gratitude to the faculty, administrators, and students who shared their experiences through our surveys.

ABOUT TYTON PARTNERS

Tyton Partners is the leading provider of investment banking and strategy consulting services to the global knowledge and information services sector. With offices in New York City and Boston, the firm has an experienced team of bankers and consultants who deliver a unique spectrum of services from mergers and acquisitions and capital markets access to strategy development that helps companies, organizations, and investors navigate the complexities of the education, media, and information markets. Tyton Partners leverages a deep foundation of transactional and advisory experience and an unparalleled level of global relationships to make its clients' aspirations a reality and to catalyze innovation in the sector. Learn more at ***tytonpartners.com***.

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This document includes examples and resources for the reader's reference. The presence of these materials is not an endorsement of any expressed views, products, or services. The materials feature opinions and recommendations from different experts, along with hyperlinks and websites that belong to other public and private organizations.

CITING THIS RESOURCE

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