sanoma learning

Sanoma Learning

European Teacher Survey 2025

The European Teacher Survey findings for 2025

The 2025 Sanoma Learning European Teacher Survey, in which nearly 7,000 teachers participated, gives insight into teachers' work environment and challenges for learning outcomes in primary, secondary and vocational education across Europe.

The survey uncovers 5 key themes:

1. **Student underperformance:** across European markets, teachers state that a large proportion of their students perform under the expected level. Particularly many teachers in Spain (80%) are saying they experience clear underperformance challenges in their classrooms, compared to other European markets, followed by Poland and Finland (37%)

2. **Strong preference for blended learning:** around 90% of teachers believe that a balanced approach including both print and digital brings about best learning outcomes, and 86% state that they can effectively balance digital and print learning materials.

3. **Digitalisation is key to supporting students with special needs:** within the blended approach, 82% of teachers agree that digital learning materials are especially useful for students with cognitive needs. This is important given that 86% of teachers state they have students with cognitive special needs like dyslexia, attention deficit, epilepsy etc.

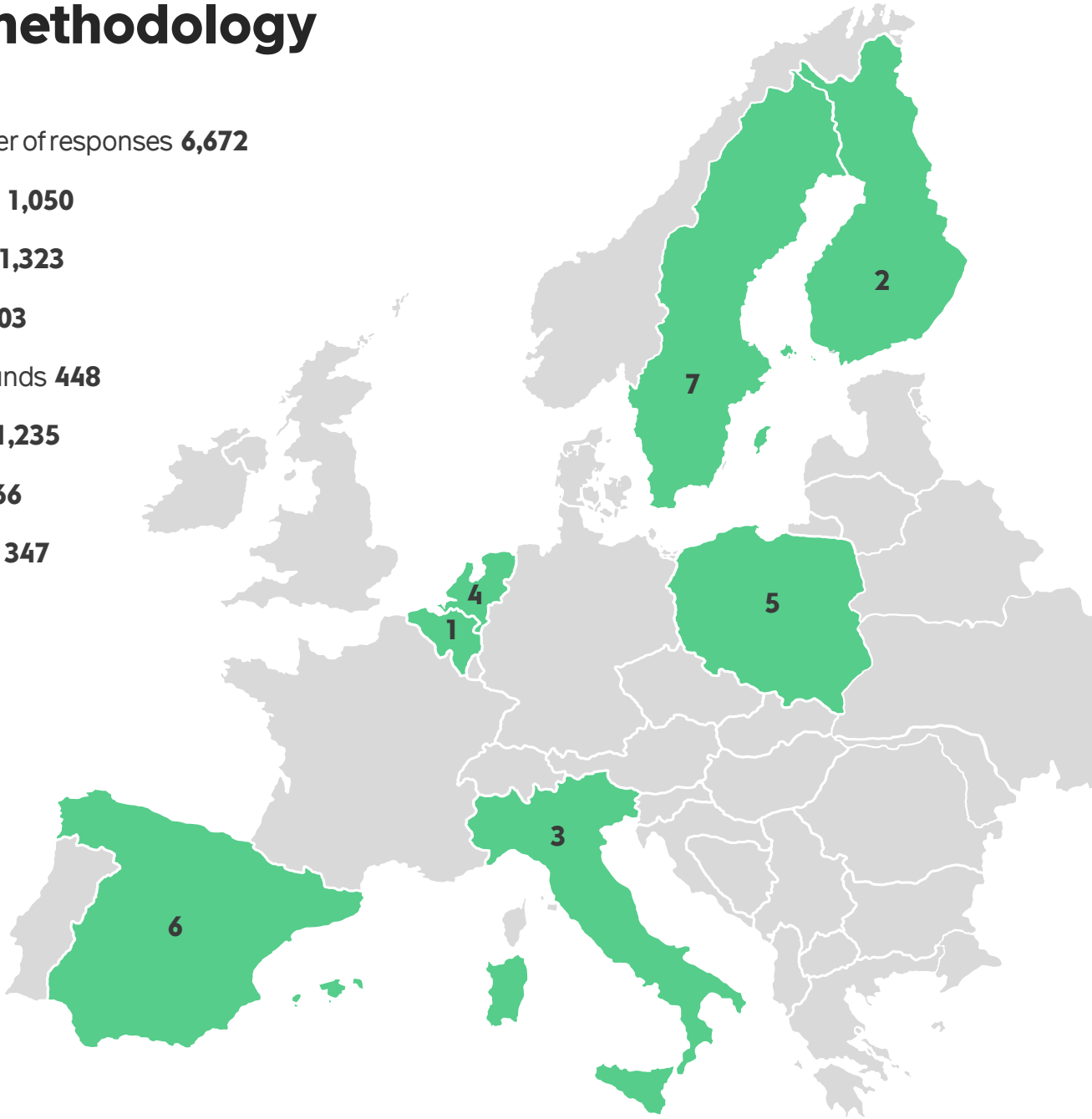
4. **Teachers are concerned about the risks and impact of AI in education:** Most European teachers (71%) continue to be concerned about the risks of Artificial Intelligence (AI) for the quality of education, and the majority of teachers emphasise the role of publishers in ensuring high-quality learning materials.

5. **Personal productivity and timesaving are considered as the main benefits of AI:** 55% of teachers believe that AI will improve the efficiency of their work, which is a significant increase from 47% in 2023. At the same time, only 14% believe that AI will have a positive influence on learning outcomes in the future, which is a notable drop from 17% in 2023.

Our methodology

Total number of responses **6,672**

1. Belgium **1,050**
2. Finland **1,323**
3. Italy **1,603**
4. Netherlands **448**
5. Poland **1,235**
6. Spain **666**
7. Sweden **347**



Facts about the survey:

- Participants: Nearly 7,000 teachers in primary, secondary and vocational education*
- Countries covered in 2025: Finland, Sweden, Netherlands, Belgium (Flanders and Wallonia), Poland, Spain, Italy
- When referring to multiple countries, figures are weighted to normalize for response rates
- Annual survey since 2021 (Also conducted 2015-2020 with different methodology)
- The survey is designed by Sanoma Learning and the research is conducted by GfK (Growth from Knowledge), a NIQ Company.

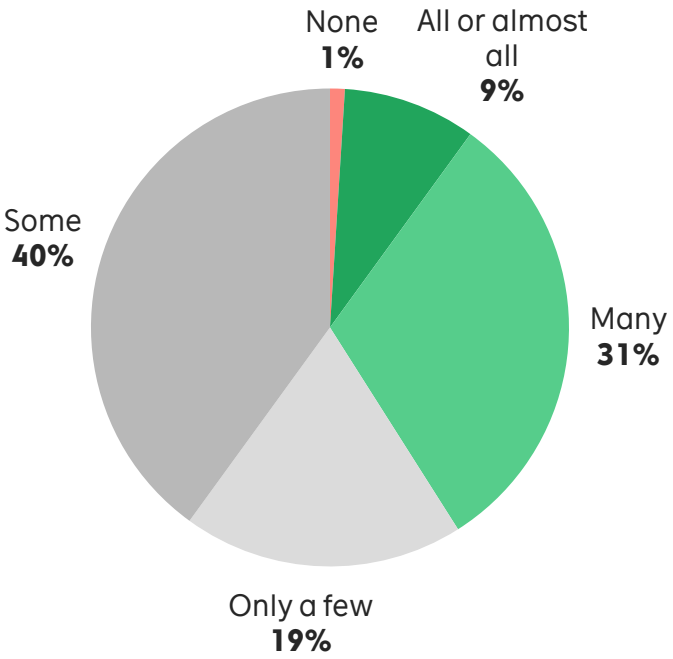
*By "secondary" we mean general secondary, i.e. ISCED 23 and 34 according to UNESCO's International Standard Classification of Education, and by "vocational", we mean vocational secondary, i.e. ISCED 25 and 35

Student underperformance – a European- wide challenge

Most teachers work with many students who are underperforming

Across European markets, teachers state that a large proportion of their students are performing below the expected level. This challenge is especially seen in primary education, and particularly in Spain – where teachers are referring to a significantly higher proportion, in their opinion, of students who are underperforming.

Teachers in primary, secondary and vocational education



40%
of European teachers say they have a situation where more than 30% of their students perform below the expected level.

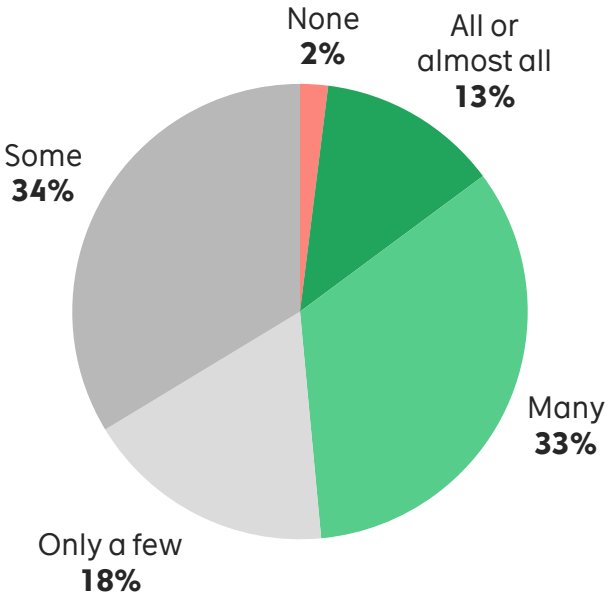
9%
of European teachers states that all or almost all of their students underperform

19%
of teachers say they have only a few students underperforming.

Higher level of underperformance reported by primary teachers

The challenge with students' underperformance is more prominent in primary education. 47% of primary teachers state that more than 30% of their students perform below the expected level. This challenge is also topped by the fact that 13% of primary teachers say they have classes where all or almost all their students underperform.

Primary education

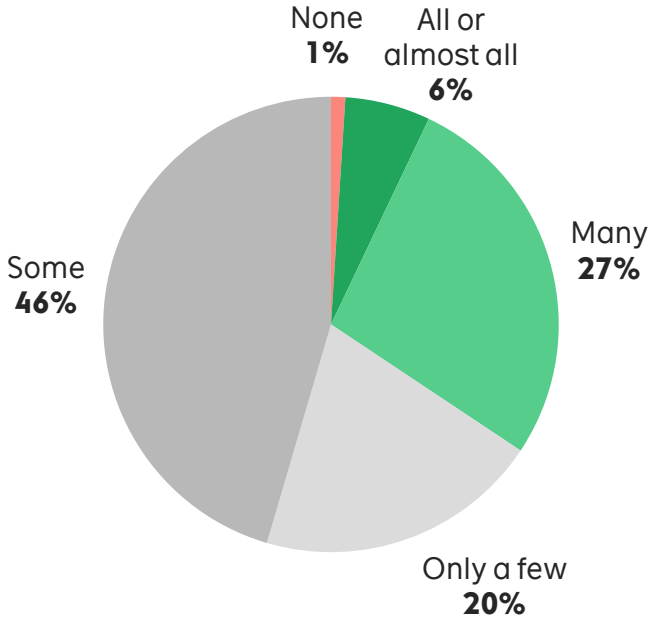


47%
of primary teachers say they have a situation where more than 30% of their students perform below the expected level.

13%
of primary teachers say all or almost all their students underperforms.

18%
of primary teachers say they have just a few students underperforming

Secondary education



33%
of secondary teachers say they have a situation where more than 30% of their students perform below the expected level.

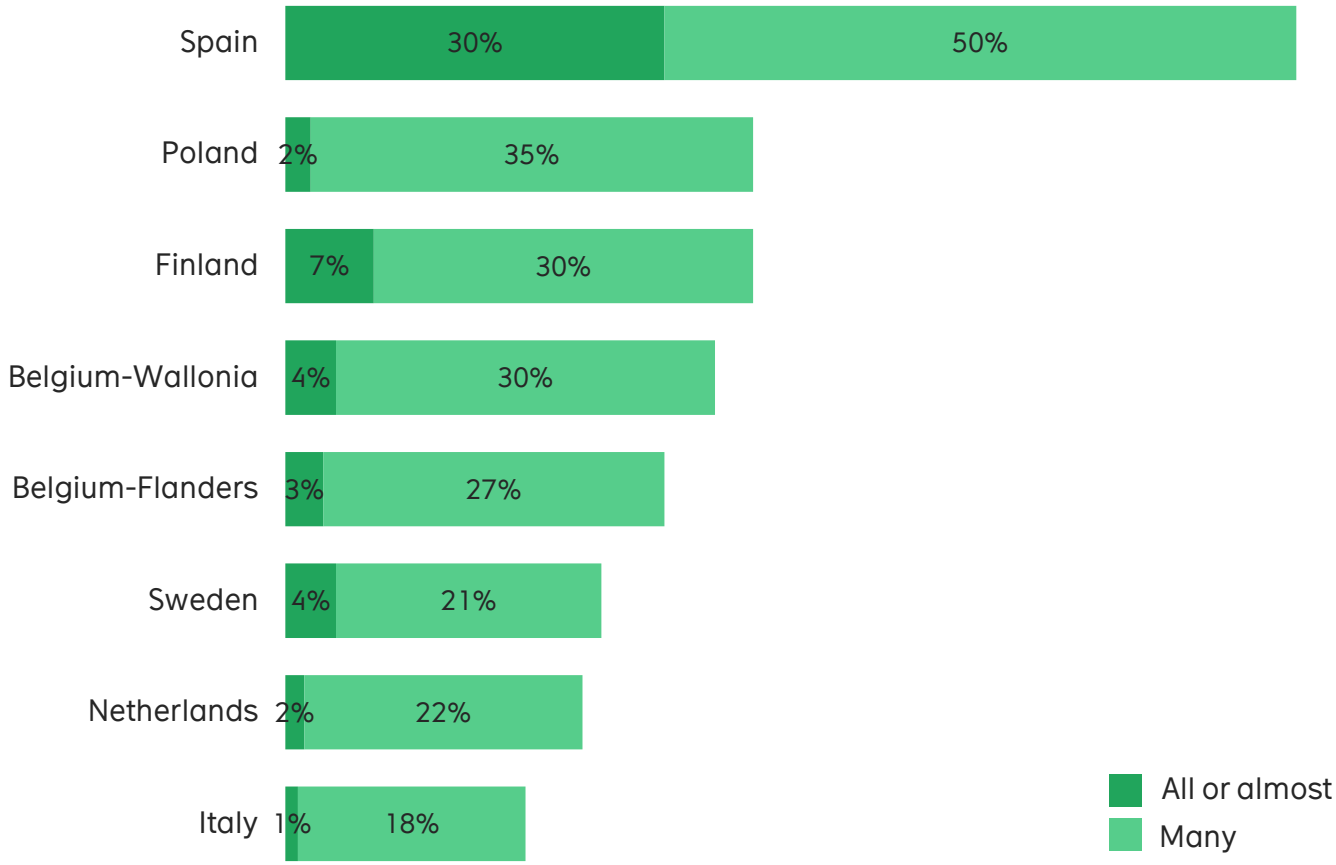
6%
of secondary teachers say all or almost all their students underperforms.

20%
of secondary teachers say they have just a few students underperforming

Spanish teachers report the highest levels of underperformance

Spain stands out with an overwhelming 80% of teachers stating that many or most (i.e. 3 or more out of 10) of their students are performing below the expected level. This result stands out compared to other European markets, followed by Poland and Finland with 37% of teachers, and Belgium-Wallonia with 33% of teachers saying the same. Lowest perception of underperformance is found in Italy, with only 19% of teacher stating they have many or most students underperforming below the expected level.

Are there underperforming students in your class?

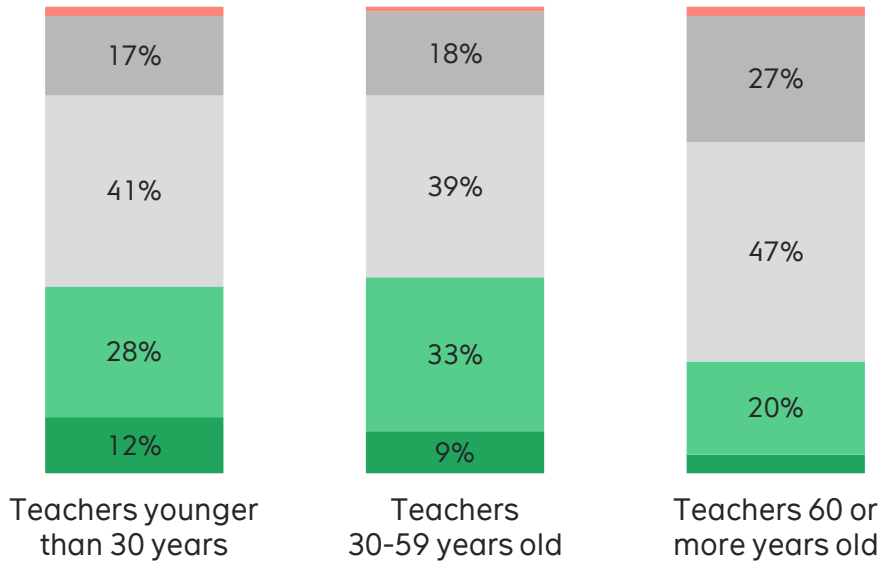


Hypothesis on Spain result

The high level of Spanish teachers saying they have many students underperforming (73% in primary and 83% in secondary education) is a strong message from Spanish teachers, which requires further analyses and follow up on a local level to identify the contextual situation. Factors that may contribute include student motivation, access to quality learning materials, and a changing or complex curriculum. Teacher shortage, high workload and administrative tasks, might also take time from teaching and from following up increasingly diverse needs and inequalities in the classrooms.

Younger teachers report a higher share of students who are underperforming

The survey shows that age matters when it comes to how teachers view the share of students performing below the expected level. Interestingly, younger teachers seem more inclined to report a higher share of underperformance.



Only 24% of teachers above the age of 60 report many to all of their students underperform, compared to 40% or more for younger teachers.

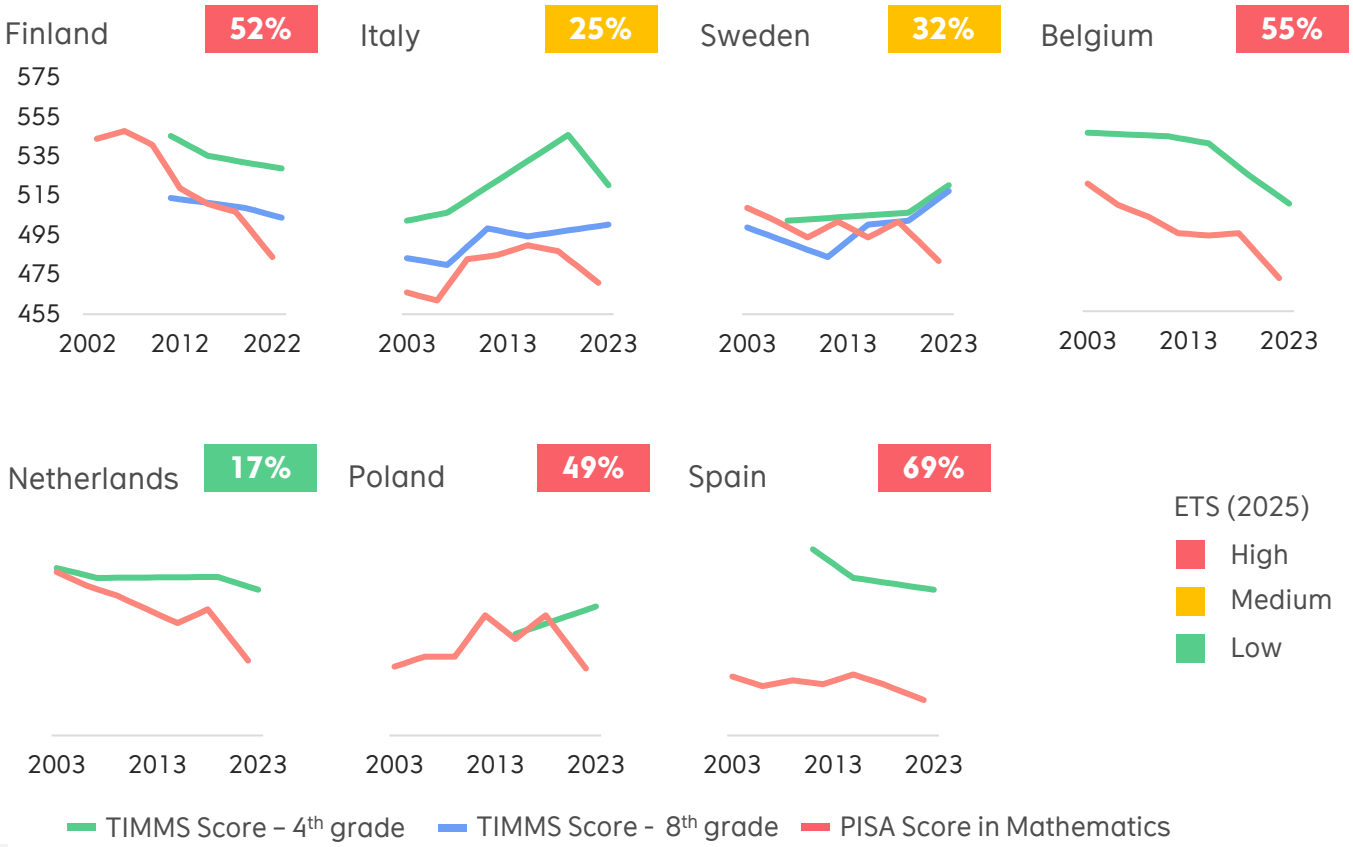
How do these findings on underperformance relate to other international studies?

The results of this European Teacher Survey resonate with the concerns about decreasing learning outcomes, following recent international studies such as TIMMS (Trends in International Mathematics and Science Study, most recent from 2023, announced December 2024) and PISA (Programme for International Student Assessment, most recent from 2022). These studies have been widely understood as indicating that students in European countries are increasingly underperforming.

There are methodological differences between TIMMS – which focuses on performance versus curriculum – and PISA, which mainly considers skills; and this survey collects teachers' opinions and not learning outcomes as such. Nevertheless, teachers' sentiment is largely in line with the studies, particularly in Finland and Belgium, where students' performance in Mathematics has been steadily declining, as well as in Spain, where the outcomes of PISA are relatively low and TIMMS steadily decreasing. In other countries, a more nuanced picture emerges; for instance, in the Netherlands despite declining PISA outcomes (and stable TIMMS results), Mathematics teachers are largely satisfied with the performance of their students.

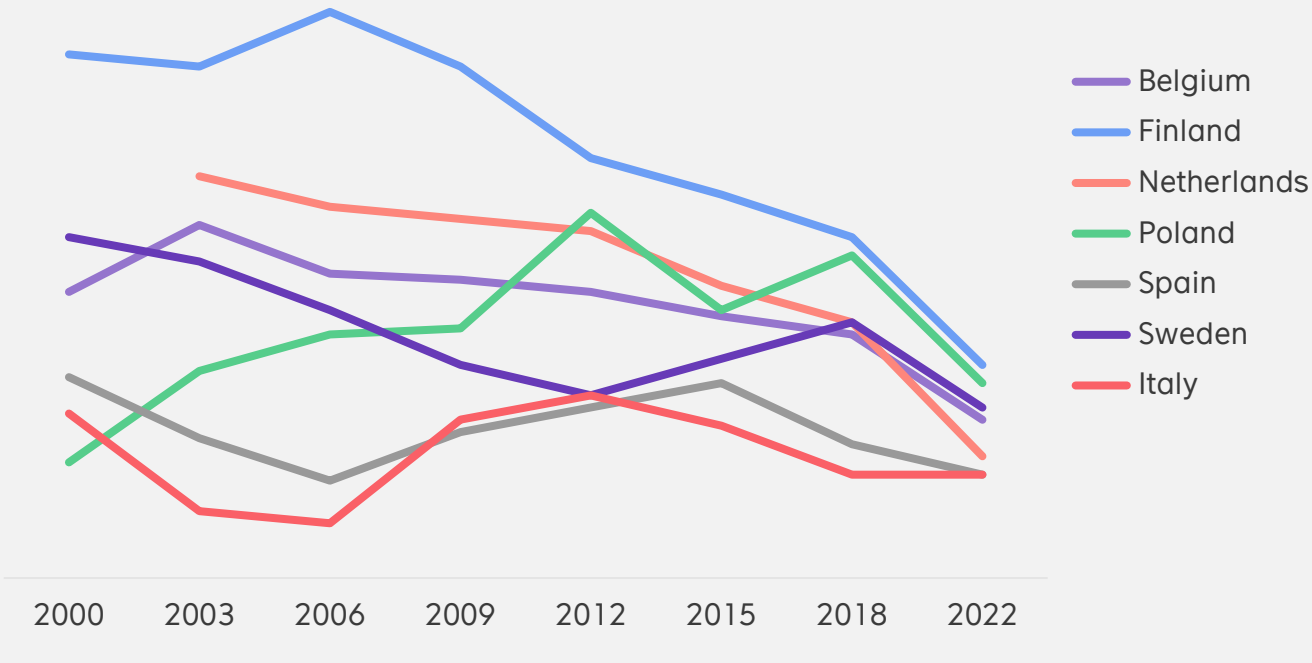
Student assessment in Mathematics (PISA and TIMMS) vs percentage of Maths teachers who say "many" or "all students" are underperforming (ETS 2025)

ETS (2025) Student underperforming vs. **TIMMS and PISA (2002 to 2023)** Student assessment



Influence by historic trend: PISA results across most of Europe have been dropping quite significantly in the last 25 years, which might additionally contribute to teachers' perception of student performance to be below expectations.

Average PISA score (across Mathematics, Reading and Science)



Teachers' view on the role of learning materials

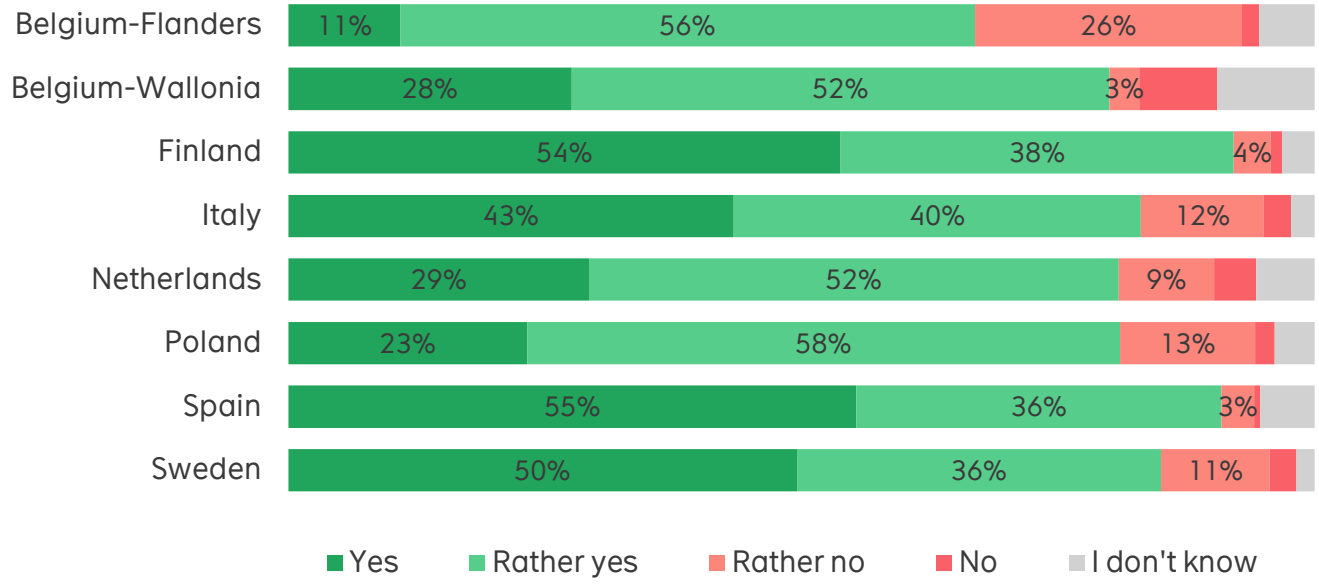
The survey shows that European teachers are consistent in their appreciation of how quality learning materials support their work. For example, to improve learning outcomes and being more efficient in their work.
Overwhelmingly, 90% of teachers believe that a balanced approach including both print and digital brings about best learning outcomes.
Digital materials are seen especially beneficial for supporting students with special needs.

Learning materials can help address students' underperformance

Most European teachers (83%) agree that quality learning materials, such as differentiated textbooks and workbooks accessible to all students, can help address student underperformance. This is most emphasised by Finnish (92%) and Spanish (91%) teachers.

Could learning materials (differentiated content, exercise books etc.) help you address students' underperformance?

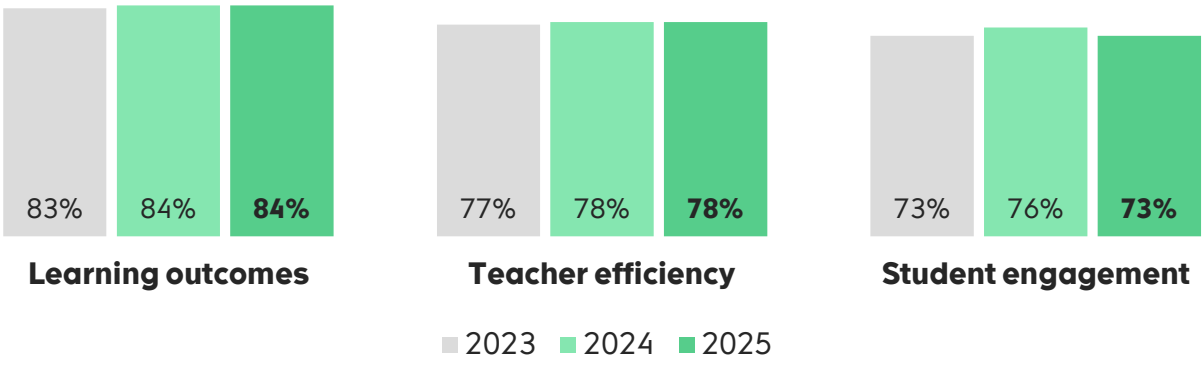
Teachers' answers



This observation is in line with the general fact that European teachers consistently appreciate how quality learning materials support their work:

- **78%** agree that learning materials help them in being more efficient in their work.
- **73%** of teachers see learning materials as a help to motivate students.
- **84%** of teachers agree that learning materials help their students reach the objectives defined in the curriculum.

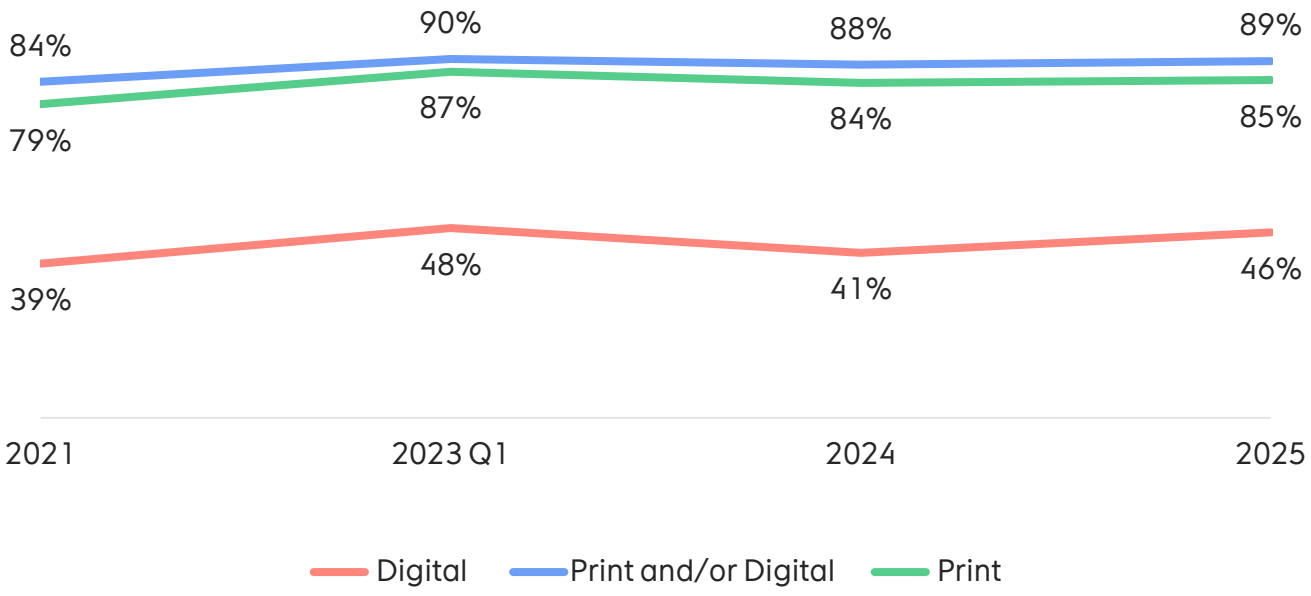
Each of these numbers has remained stable over the last few years.



Strong preference for blended learning – today and looking at the future

Overwhelmingly, almost 90% of teachers believe that a blended approach to learning materials - including both print and digital - brings about best learning outcomes. At the same time, as can be seen further on in this chapter, relatively few see digital tools alone to improve learning outcomes.

This is in line with the fact that the use of printed textbooks and/or workbooks remains stable, with almost 90% teachers using them 2-5 days a week.



As the percentage of teachers using digital content is slowly increasing, teachers continue to appreciate printed learning materials – textbooks and workbooks.

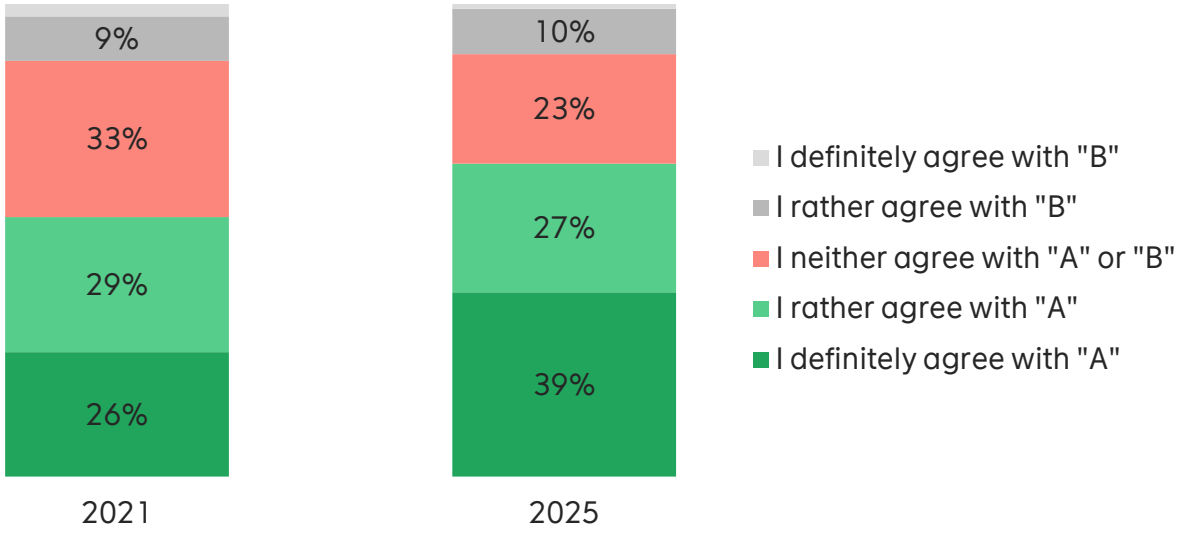
In your opinion, in the future...

Particularly (but not only) in the Nordics, teachers increasingly recognise the role of printed learning materials. For instance, in this year's survey, 66% of Swedish secondary teachers agreed that in the future learning materials should be print-first – which is a significant increase from 55% agreeing in 2021's survey. For Finnish secondary teachers, a similar increase from 41% to 65% can be seen.

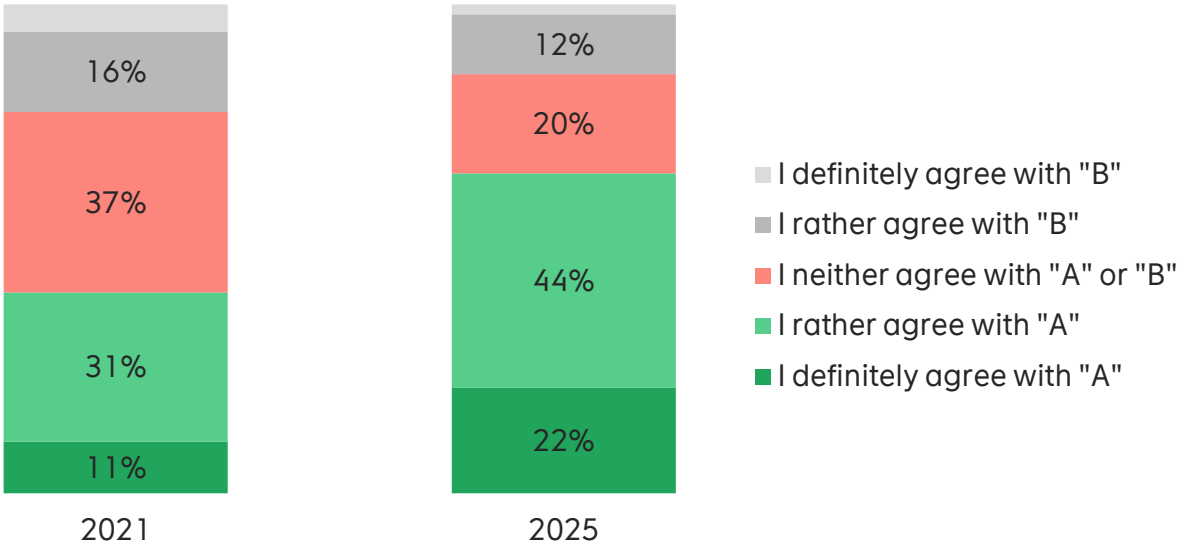
In general, across the European markets, the survey results from 2021 to 2025 indicate that the number of teachers who foresee a digital-only future is small and continues to decline.

Learning materials should be mostly printed, or paper (A), or Learning materials should be all or almost all digital (B)

Sweden: Secondary teachers



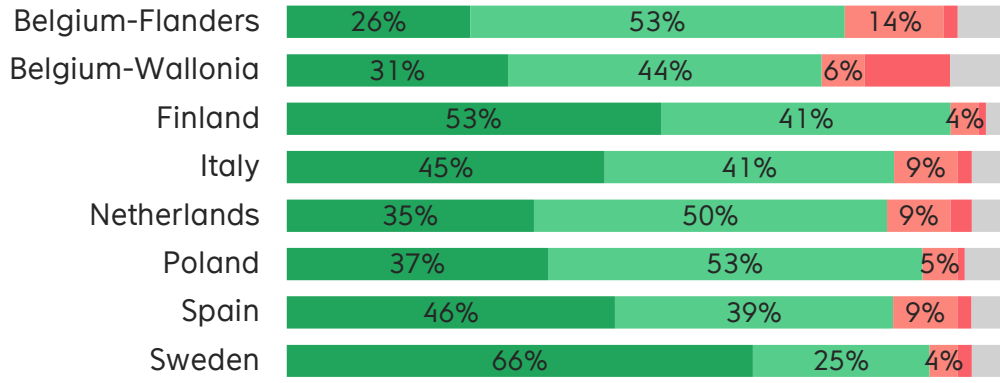
Finland: Secondary teachers



Teachers are confident in balancing the use of digital in a blended learning approach

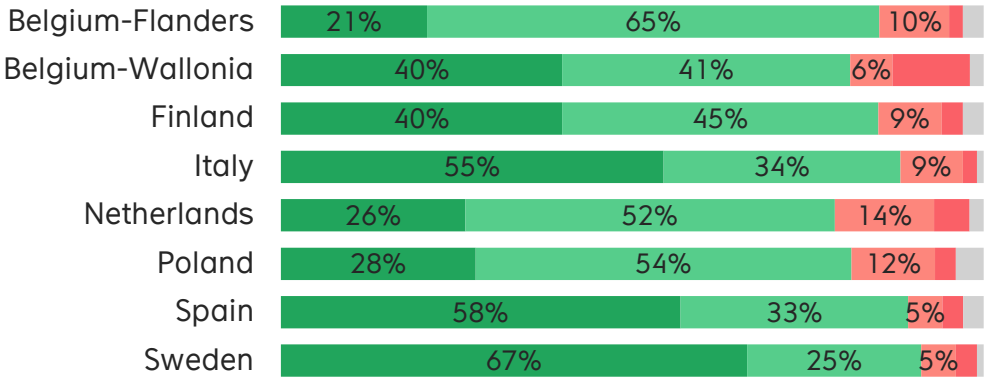
At the same time believing in the advantage of blended and often print-first methods, teachers largely recognise the potential of digital tools and use them in a balanced way:

"I am effectively able to balance digital and traditional methods":



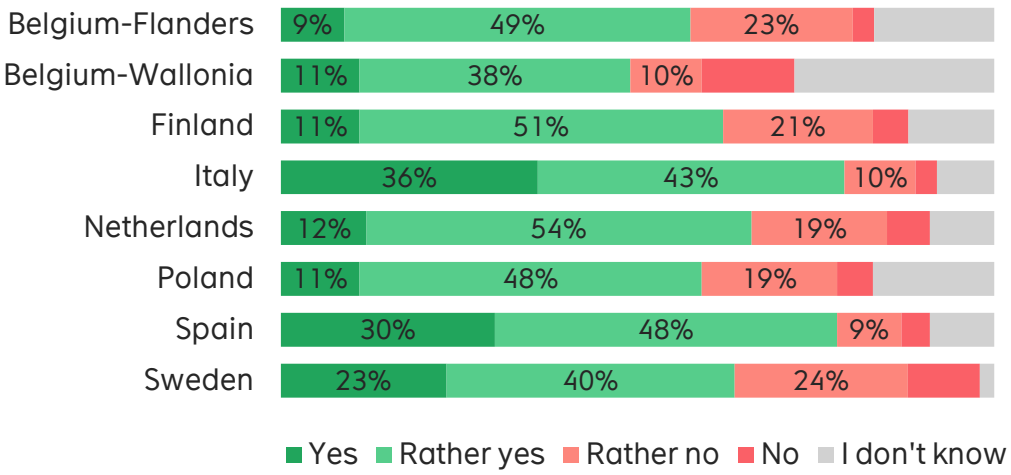
86%
state that they are able to effectively balance digital and traditional methods

"I feel confident using digital tools in the classroom":



87%
feel confident using digital tools

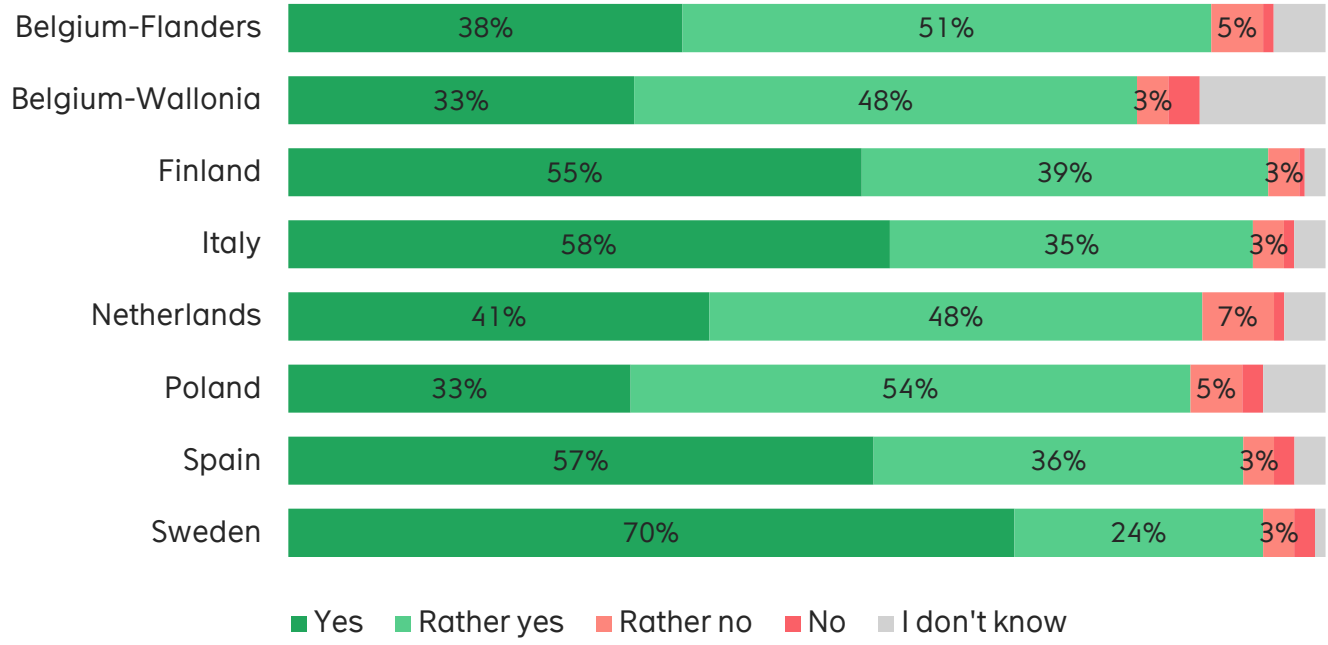
"Digital tools improve student learning outcomes in my teaching":



70%
of teachers believe digital tools can improve student learning outcomes

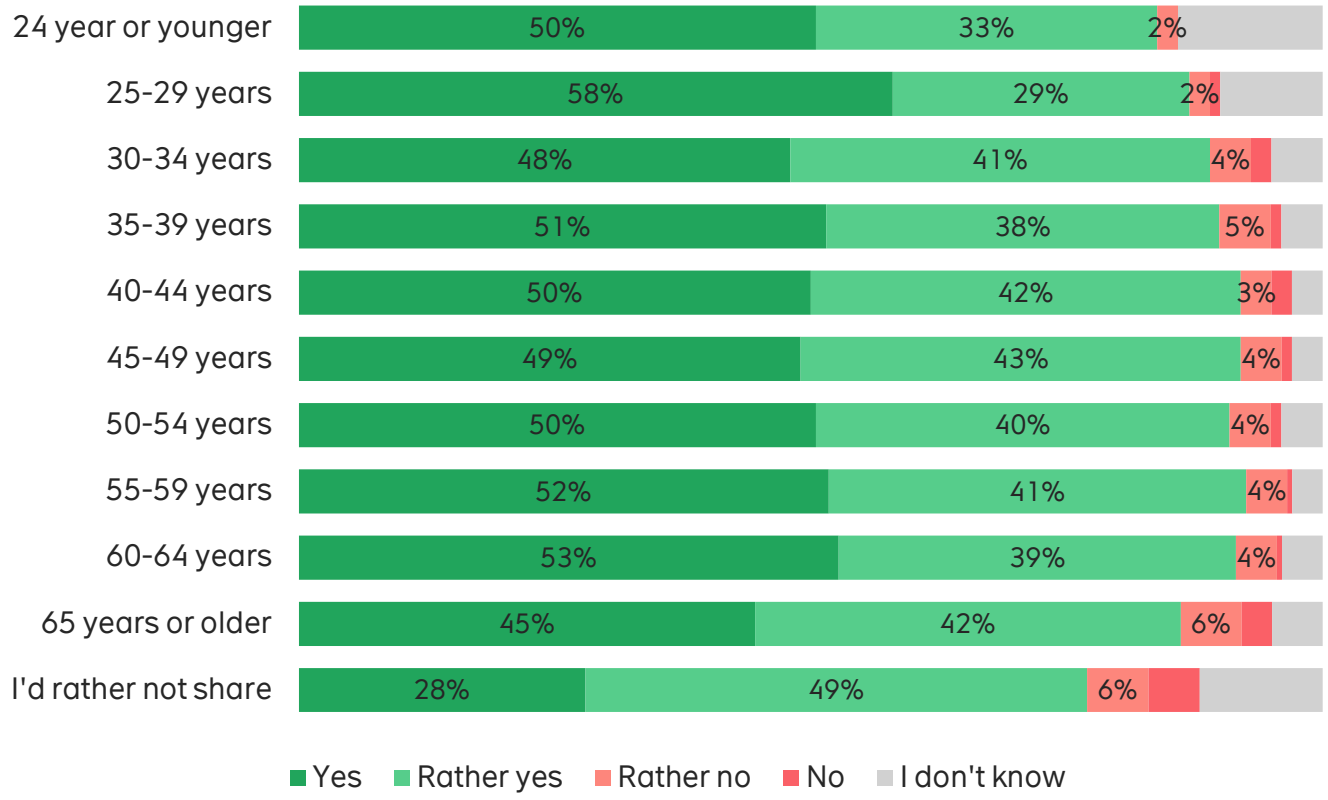
This number goes even higher – to 85% - when we consider students with special needs (e.g. cognitive, speech, visual, hearing, motoric needs).

A balanced approach that includes digital, traditional, and blended/hybrid learning methods helps student success



The outlook on the benefits of blended learning is strong in all markets, ranging from 87% in Netherlands and Poland to 93% in Sweden.

A balanced approach that includes digital, traditional, and blended/hybrid learning methods helps student success

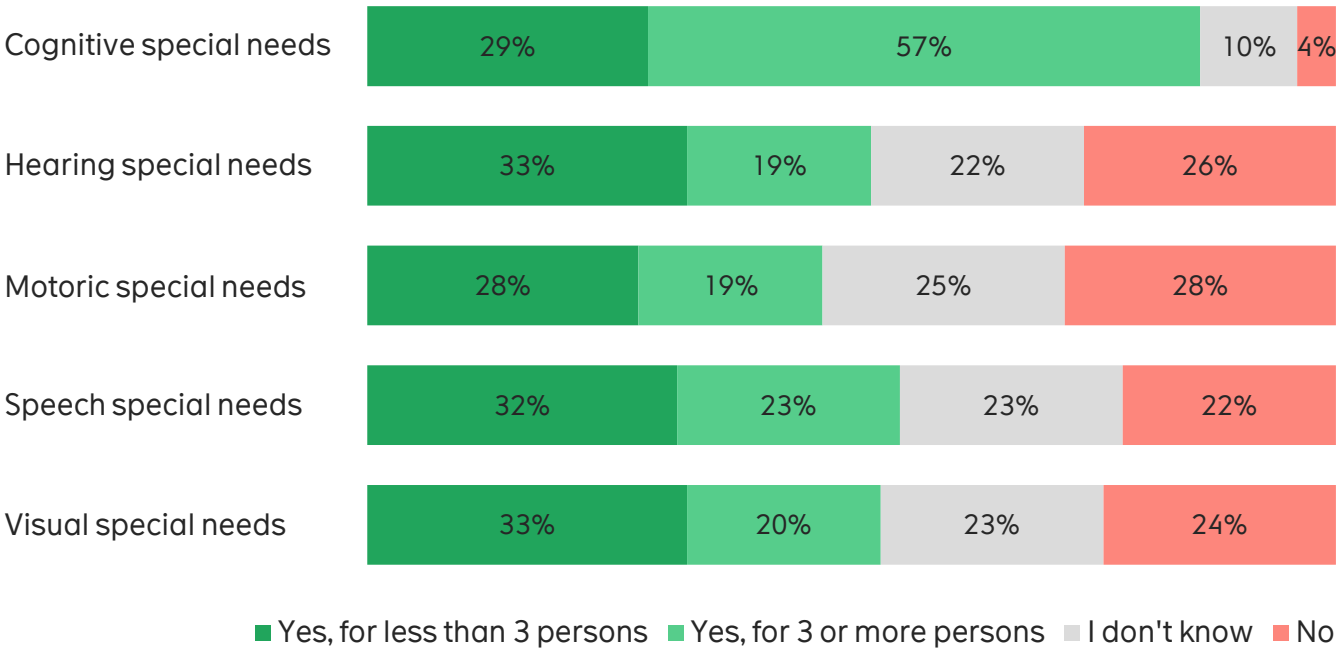


Similarly, teachers largely agree across all age groups, with ~90% believing blended learning brings benefits to the teaching process across all age groups.

Digital learning materials: key for supporting students with special needs

One area where digital learning materials can be particularly useful according to European teachers, is in supporting students with special needs, especially cognitive needs.

Would digital learning materials adapted for use by persons with the following special needs be useful for you or your students?

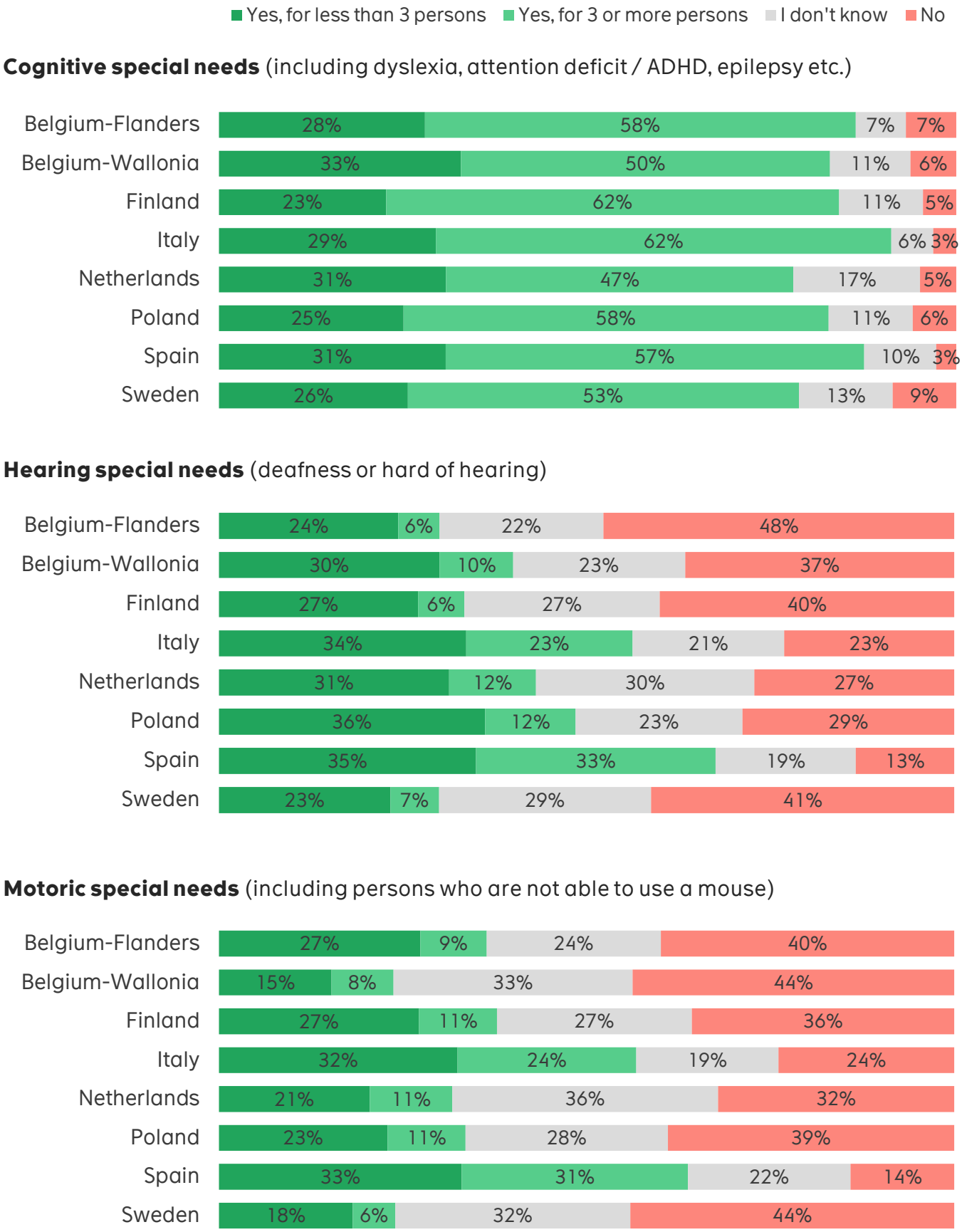


Italian teachers mostly agree that digital learning materials especially can support their students with special cognitive needs, with 91% in favour of this statement. 88% of Spanish teachers also agree.

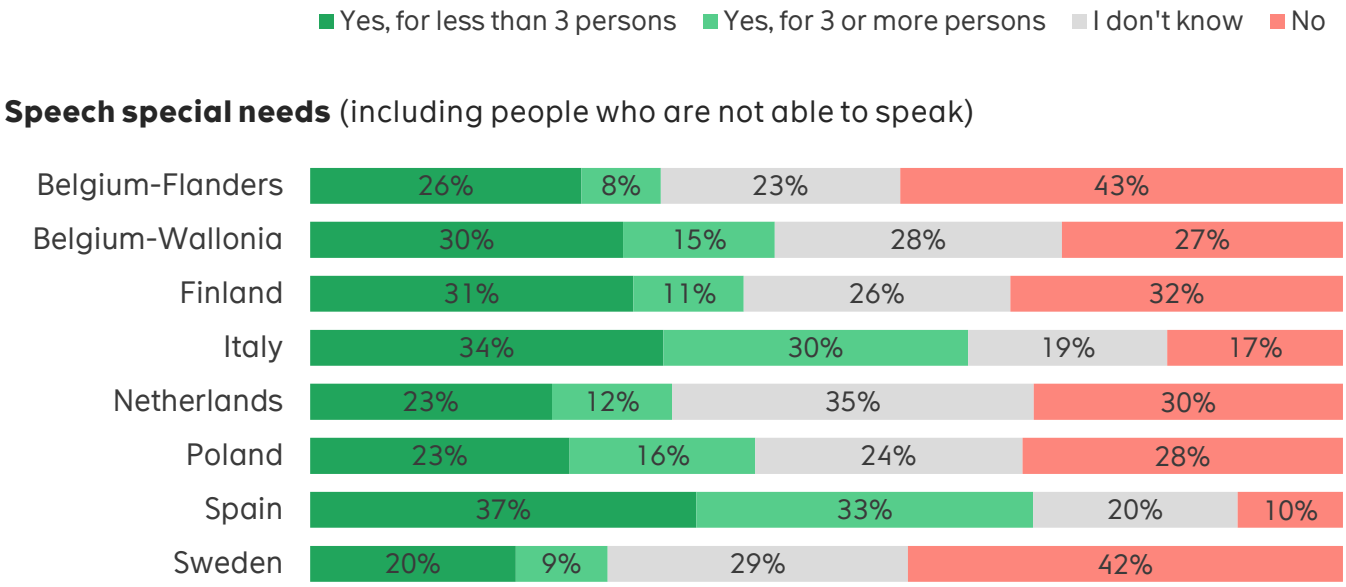
82%
of teachers agree that digital learning materials are especially useful for students with cognitive needs like dyslexia, attention deficit, epilepsy etc

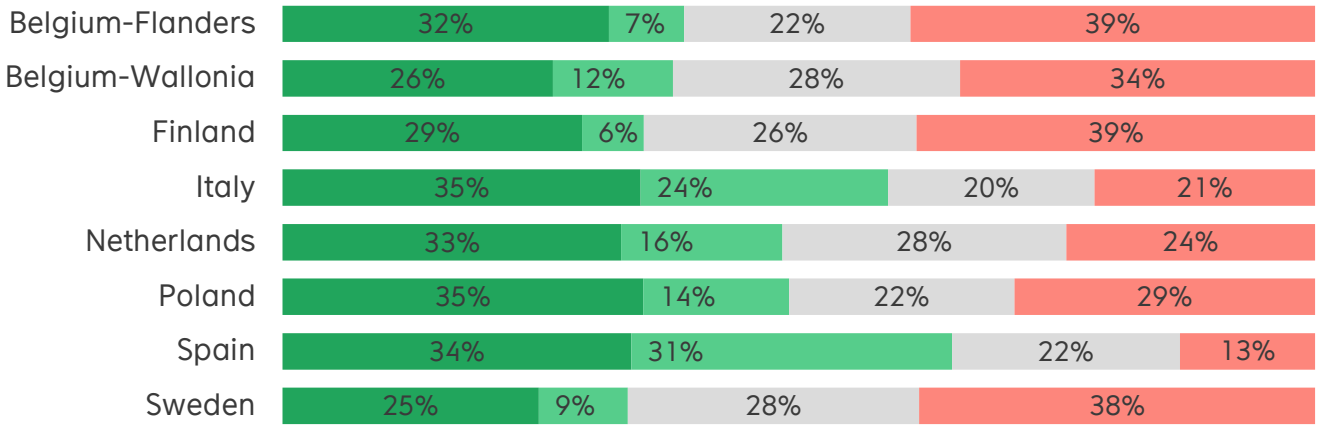
86%
of teachers state they have students with cognitive special needs (including 57% who have 3 or more such students).

Would digital learning materials adapted for use by persons with the following special needs be useful for you or your students?



When it comes to other special needs than cognitive needs, most teachers are pointing to visual and speech needs as areas where digital materials can help.





Inclusive learning & accessibility

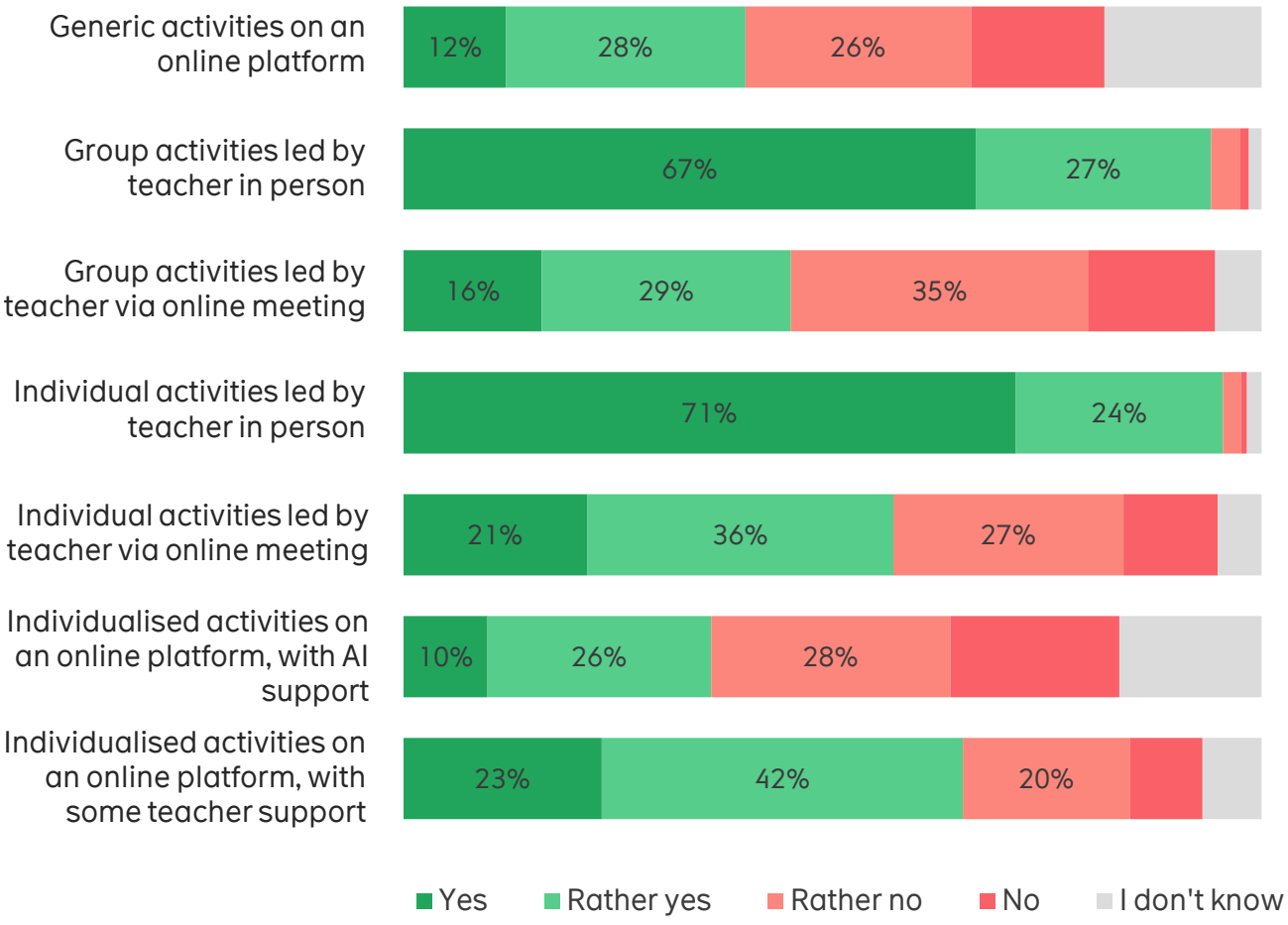
With the upcoming European Accessibility Act (EAA) of 2025, digital accessibility requirements will be harmonized across EU countries. As an inclusive learning company, Sanoma Learning supports this regulation, and highly values meeting the diverse needs among students.

Read more about Sanoma Learning's approach to inclusive learning

Teachers believe after school tutoring can improve learning outcome

In addition to the appreciation of quality learning material, and digital tools for addressing special needs, most European teachers believe tutoring can help students improve their learning outcomes.

Do you think the following forms of tutoring can help students improve their learning outcomes?



Almost all teachers view group activities led by teachers in person (95%), and individual activities led by teachers in person (94%), as the most important form of tutoring to improve learning outcomes among students. 40% of European teachers see value of general activities on online platforms. At the same time 65% of European teachers is in favour of individualised activities on an online platform, with some teacher support.

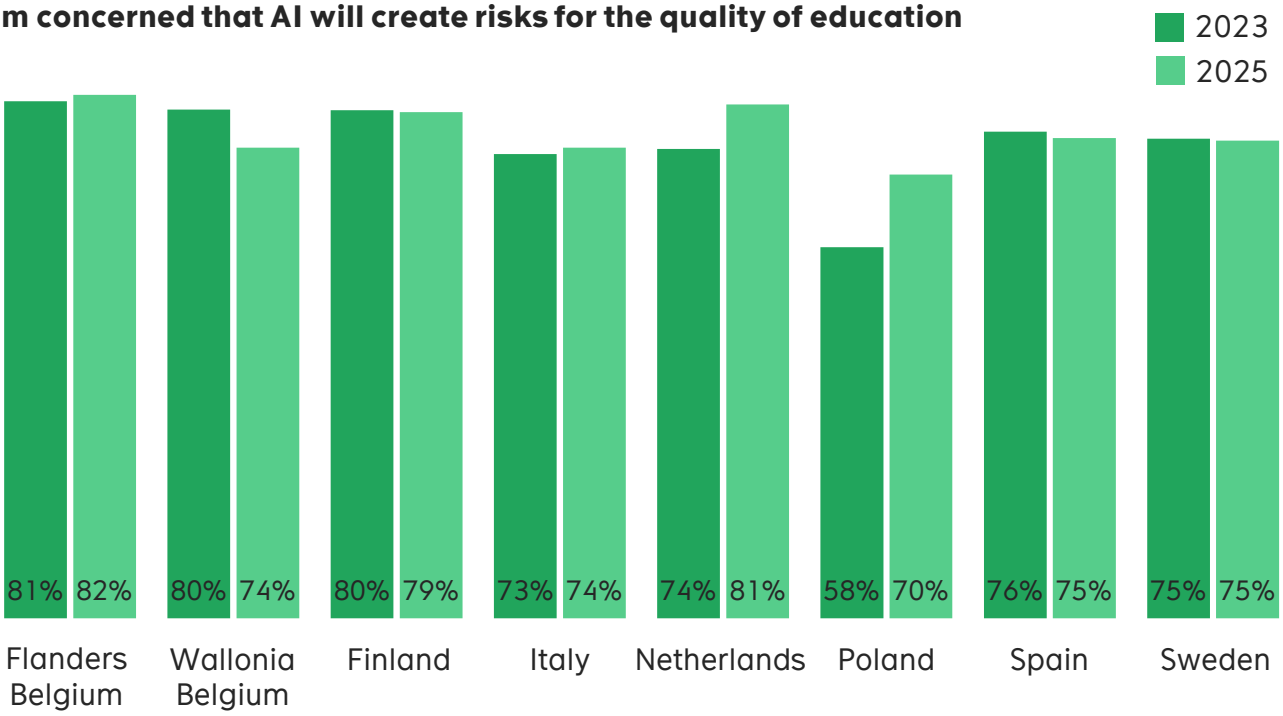
Teachers' view on generative AI in K12 education

European teachers see the main benefit of AI for improving the efficiency of their work (55%). At the same time, only 14% believe that AI will have a positive influence on learning outcomes. Overall, most teachers (71%) continue to be concerned about the risks of AI for the quality of education, and the majority of teachers emphasise the role of publishers in ensuring high-quality learning materials.

Teachers are largely cautious towards use of AI in education

The share of European teachers agreeing that AI will create risks for the quality of education is relatively stable with 71% in 2025, compared with 73% in 2023. There are some developments in the differences between markets, and the most significant increase in AI-scepticism is seen in Poland where 70% of teachers are concerned, compared to 58% in 2023 – followed by the Netherlands increasing from 74% to 81%. In Belgium-Wallonia, we see an opposite trend where 74% are concerned compared to 80% in 2023.

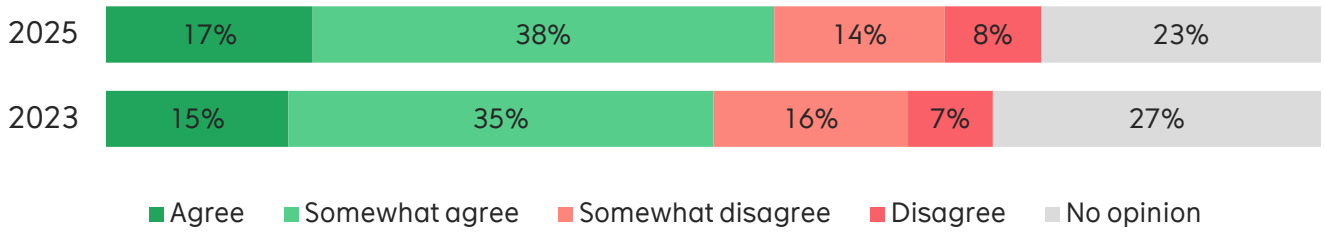
I am concerned that AI will create risks for the quality of education



Productivity and time saving are considered the main benefits of AI

The share of teachers who believe AI will enhance the efficiency of their work in the future, increased from 47% in 2023 to 55% in 2025. This shows a more positive view on the applications of AI, where digital technology has potential to help them save time.

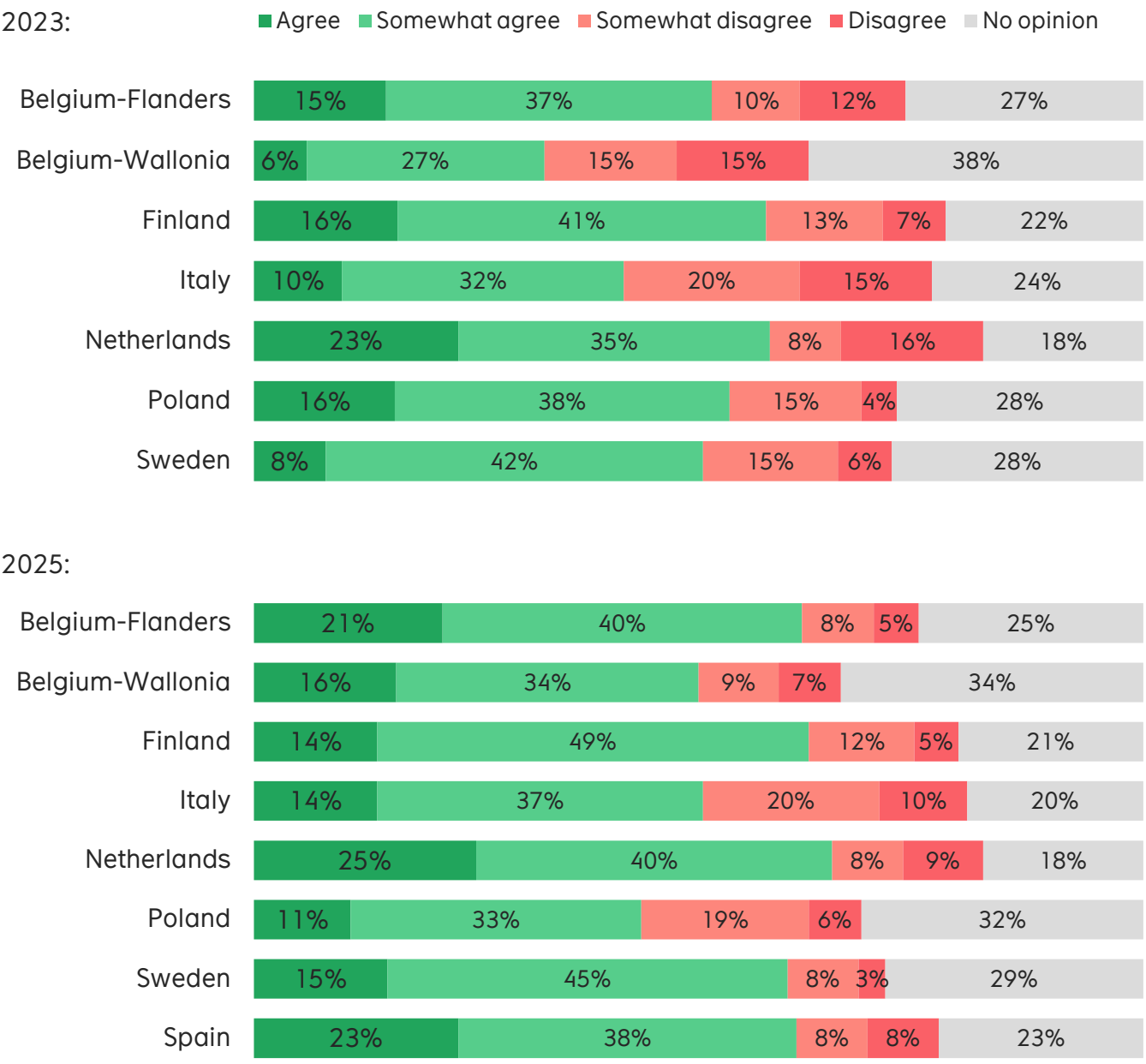
In the future, thanks to AI, teachers will be able to save some time



Comparing views on efficiency gains from AI between markets

According to the survey, teachers in the Netherlands are most in agreement that AI has the potential to help them save time (65%), with Finnish teachers following with 63% in favour. Comparing the historical results, teachers in Belgium Wallonia are significant more positive towards the value of AI for saving time, with 50 % in agreement in 2025 compared to only 33% in 2023.

Do you agree with the following statements on AI?", and then the sentence was "In the future, thanks to AI, teachers will be able to save some time

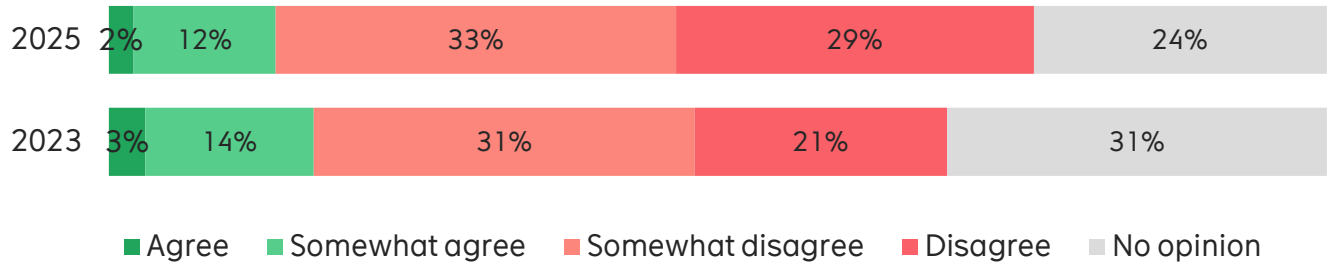


Lower expectation for AI supporting better learning outcomes

Only 14% of European teachers believe that students in the future will reach better learning outcomes thanks to AI. This is a notable lower share than in 2023, when 17% of teachers agreed with this statement.* At the same time 25% of teachers are stating they have no opinion, which is a large population of teachers that may see AI as irrelevant or experience limited knowledge or uncertainty on how this new technology will develop and be implemented within the educational sphere.

*This question was not applied for Spanish teachers in 2023, and Spain is therefore not included with 2023 results.

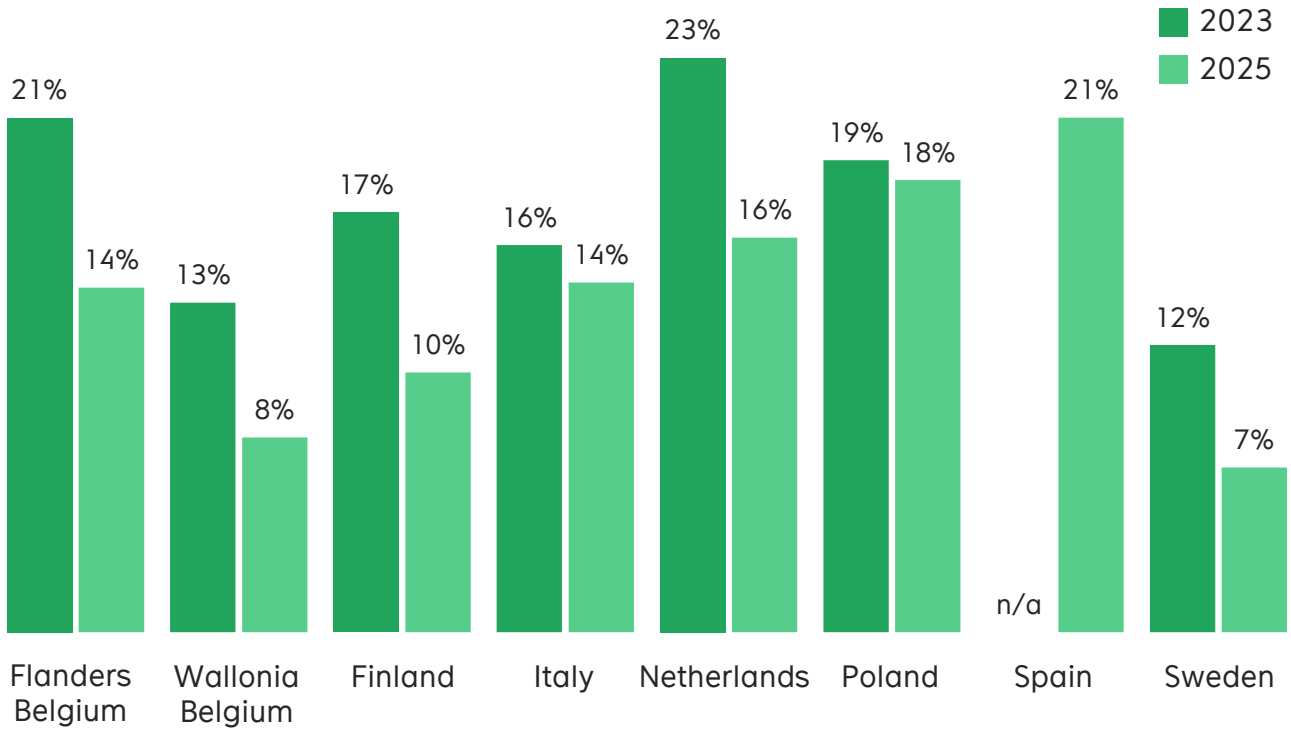
In the future, thanks to AI, students will reach better learning outcomes



This conservative view on AI 's future value for pedagogical work is also seen on the other end of the scale, where 62% of teachers somewhat or wholly disagree that AI will help students reach better learning outcome, compared to 52% in 2023.

Hypotheses: Limited pedagogical support in current AI tools available

When we look closer on the different markets, we see the biggest drop – in teachers believing in AI to support learning outcomes – in the Netherland (-7,2 percentage points) and in Belgium Flanders (-6,8 percentage points). These markets are also the markets where teachers report the highest frequent usage of AI tools (see later in this chapter). Such a development may point towards a disappointing experience in how the current AI tools available for teachers are tailored for supporting their pedagogical work.

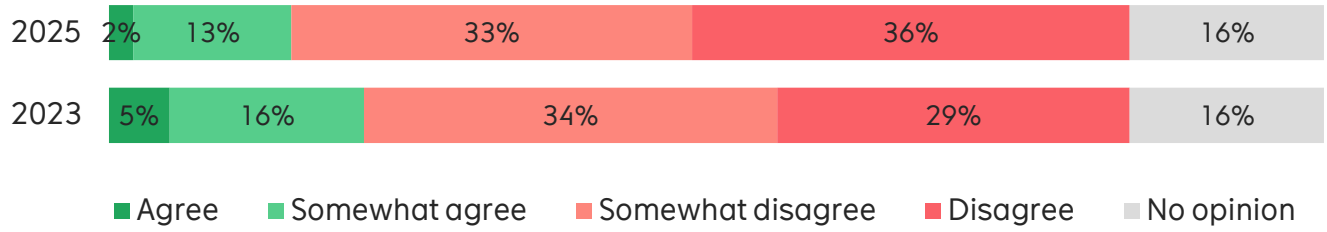


*This question was not applied for Spanish teachers in 2023, and Spain is therefore not included with 2023 results.

AI seen as a complementary tool to printed and digital learning materials

As AI becomes less of a novelty and more of daily reality, significantly fewer teachers think that in the future it will make textbooks unnecessary. Only 14% of teachers in 2025 believe AI will replace textbooks, compared to 21% in 2023.

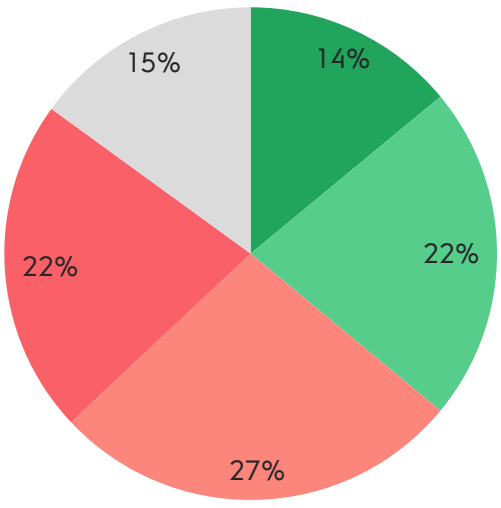
In the future, AI will make textbooks unnecessary



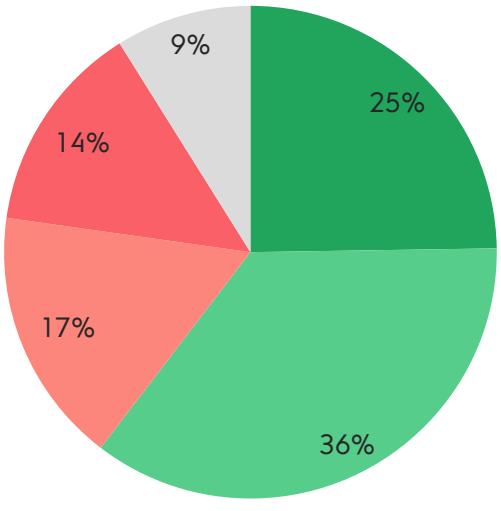
> This suggests that teachers view AI similarly to other digital technologies: as a tool to complement printed content in a blended learning approach, rather than replace it. Regarding AI's role, teachers' recognition of the importance of human involvement in maintaining pedagogical perspectives and quality may also be relevant.

The above hypothesis is supported by further findings in this survey. The majority of teachers emphasise the role of publishers in ensuring the quality of learning materials. If a textbook was created by AI alone, only 36% of teachers would consider using it. However, if the AI was supervised by editors from a publishing house, up to 61% would consider using it.

Would you consider using the following materials for teaching, or recommending them to your students, if these materials were written by artificial intelligence, 2025



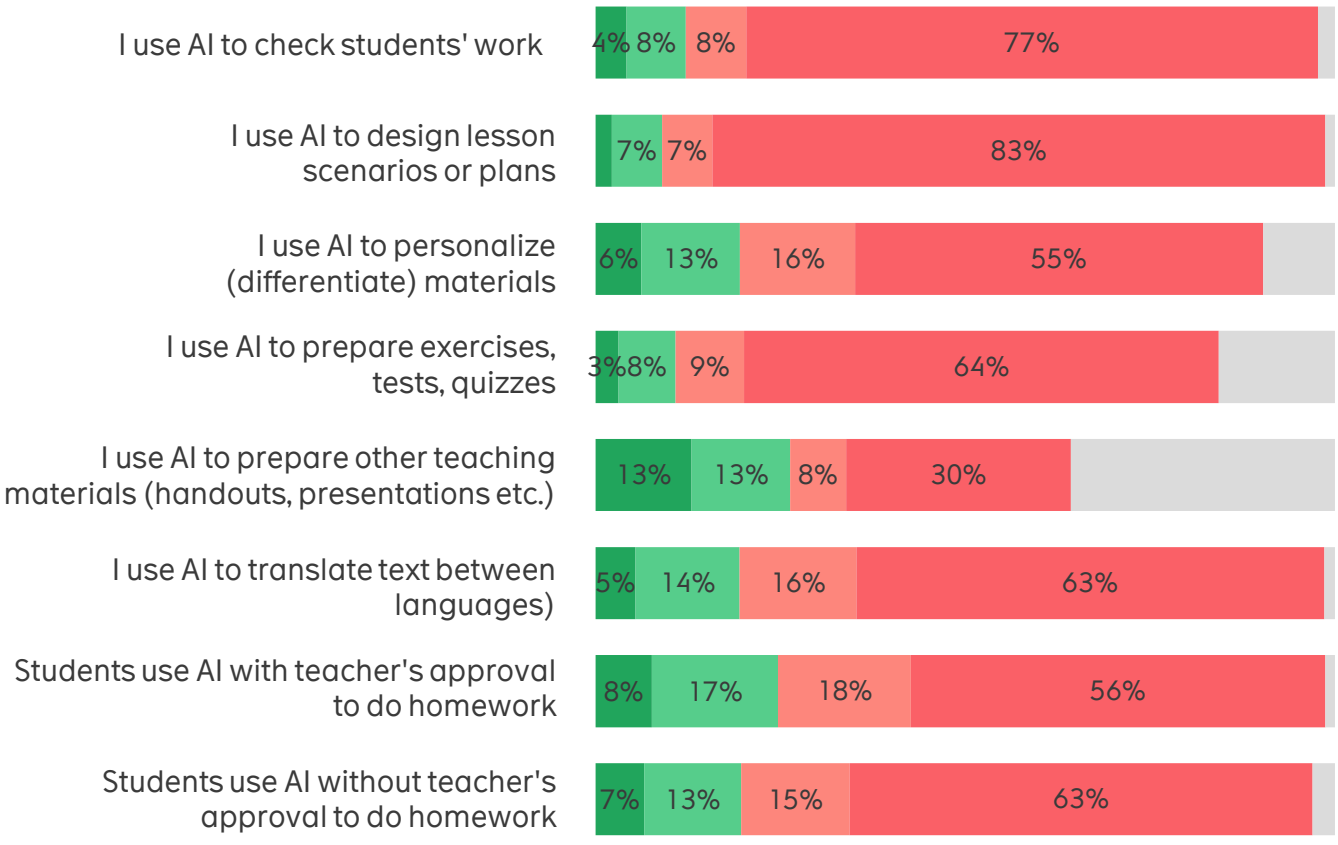
Would you consider using the following materials for teaching, or recommending them to your students, if these materials were written with the help of artificial intelligence, but supervised by editors from a publishing house, 2025



How do teachers use AI today?

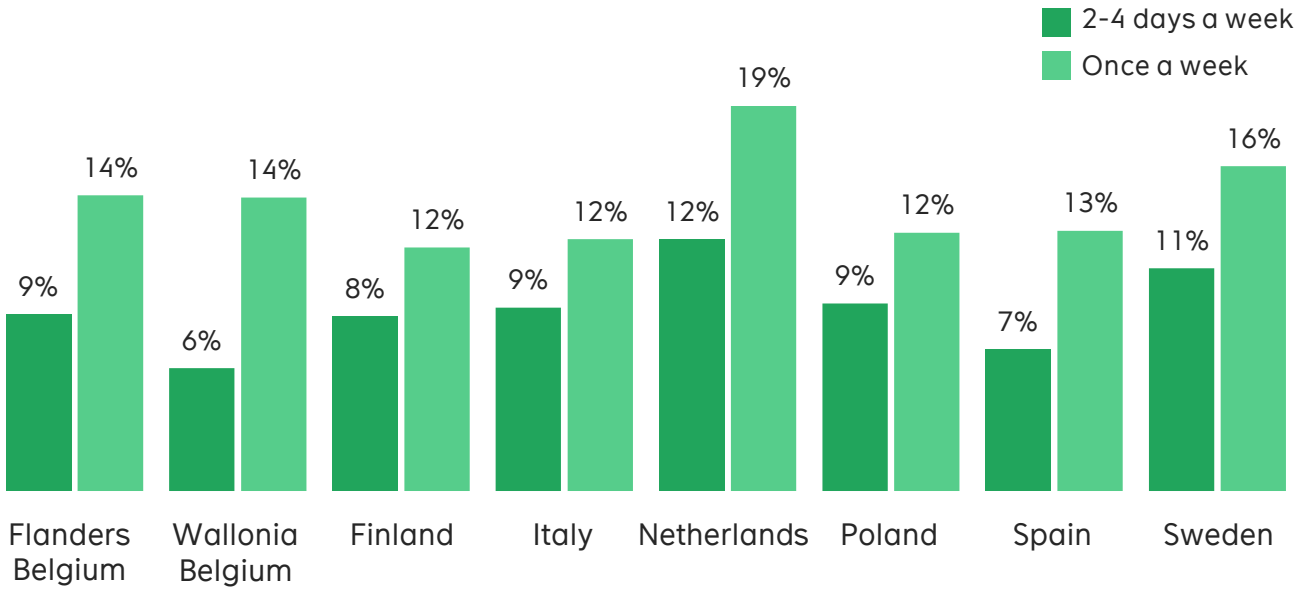
According to this survey, almost one third (30%) of European teachers are currently using AI tools, with 18% using them weekly or more frequently to support their work.

The primary use cases (once a week to once a month) include preparing other teaching materials like handouts and presentations (26%), approved student use of AI for homework (25%), translating texts (19%), and personalising or differentiating materials for students (19%).

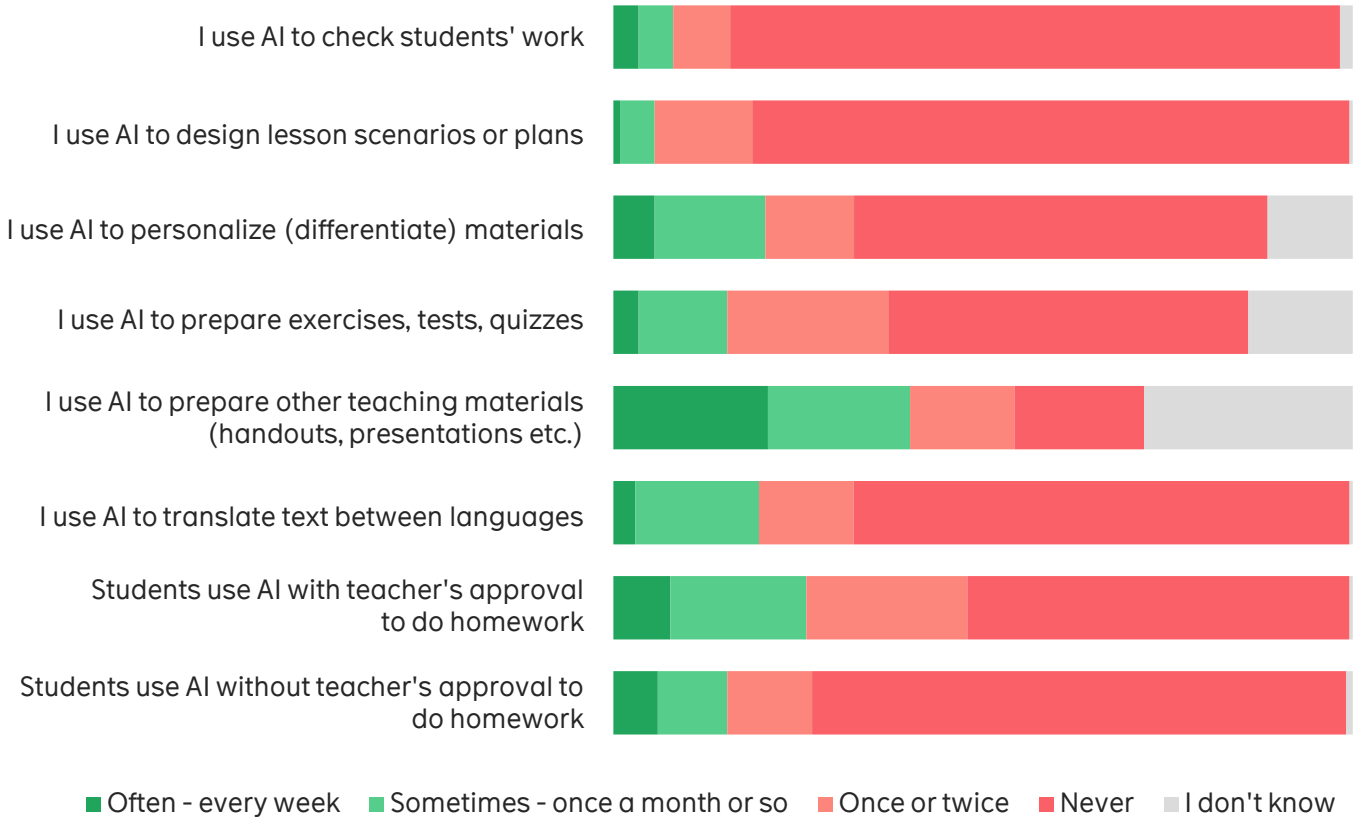


Differences in use of AI: Nationality, educational levels and age matters

The difference in use of generative AI between markets and educational levels is significant, where adoption rate (understood as using AI at least once a week) varies from 19% in Spain to 31% in Netherlands.

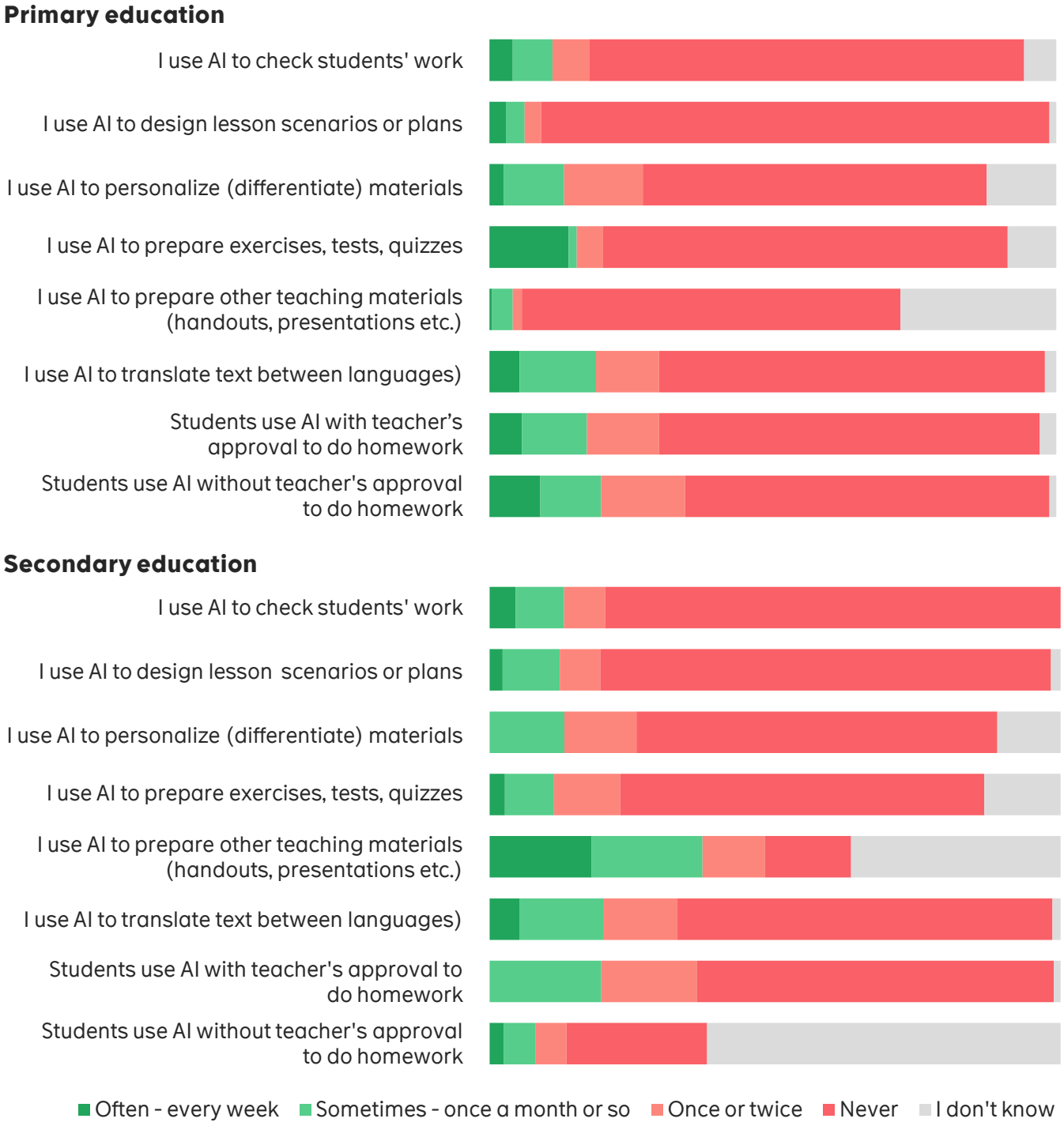


In the Netherlands, **40%** of secondary teachers use AI to prepare supporting teaching materials – especially in Foreign Languages and Social Sciences



Differences between the use of AI in primary vs. secondary education

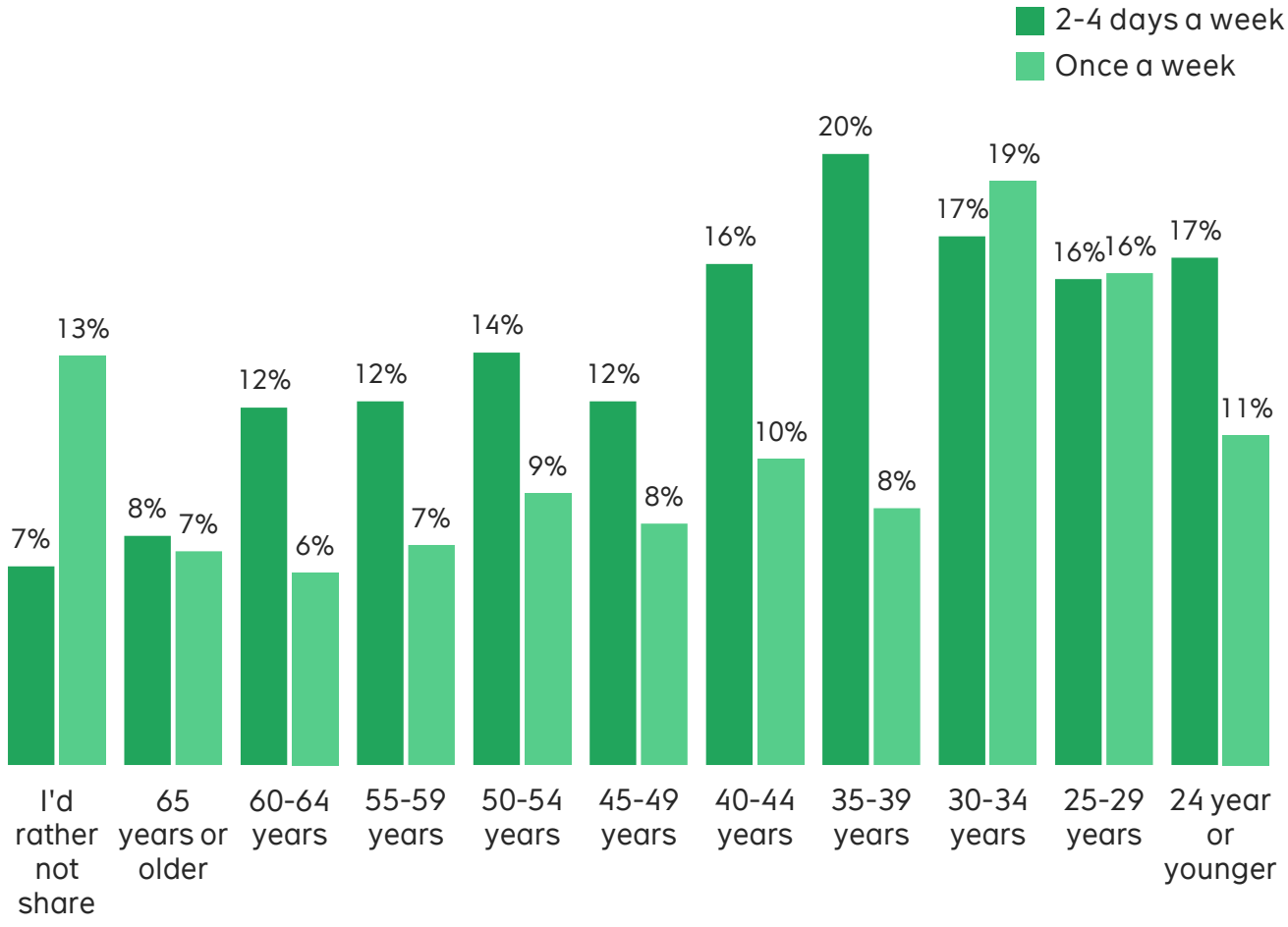
There are several significant differences in AI use cases between primary and secondary schools. Most notably, ~40% of teachers in secondary education use AI to prepare materials for students at least once a month, incl. 20% who do it at least once a week. At the same time only 7% of primary teachers use AI for this purpose monthly, including just 2% weekly.



Another difference is teachers' willingness to use AI to prepare exercises, tests and quizzes. About 12% of secondary teachers do it monthly, while only 5% of primary teachers do the same. This difference may be due to the secondary materials being more focused on content, rather than form that is needed to engage primary students.

Age: Most frequent use of AI among young teachers

Unsurprisingly, it is among the youngest teachers where most adopters can be found. Weekly usage of AI tools reaches up to 36% in 30-34 group, compared to 20% and less for teachers above 45 years of age.



Looking at the future: Responsible use of AI in Education

Based on the findings in this survey, we anticipate that AI will become more important as a complementary tool in blended learning, especially for tailoring content to meet diverse student needs and improve learning outcomes in the future.

Younger teachers use AI more frequently and students are adapting to the technology with or without teachers' approval. In general, European teachers also increasingly recognise the benefit of AI for their work efficiency, even if they are cautious in their approach to use AI in their pedagogical work to improve learning outcomes.

Working together with these perspectives from our teachers, publishers can take a clear role in ensuring the quality of materials and mitigate the risks of AI for the quality of education.

Purpose built pedagogical AI solutions, tailored to the needs of the teachers and local curriculums, will give a quite different environment to explore than random testing of generative AI models without clear guidance. The use of AI to support pedagogical work may increase significantly, as AI tools become more embedded with blended learning content where it can add value in terms of learning outcomes.

The responsible use of AI can bring significant improvements to the way we teach, learn, and work. The risks need to be taken seriously, both related to data security, privacy, fact checks, bias and potential censorship in AI models. Following ethical AI principle, with human guidance and teachers leading the learning process, this technology can be an important tool to improve accessibility, optimise tasks, and personalise learning experiences. We believe that teachers will remain at the center of the learning process, and we will continue to support teachers and students with high quality trustworthy content, curated by human experts.

Together, we can shape the future of learning, where physical books, digital materials and AI tools can help all students reach their potential.

Read more about responsible use of AI in education and our ethical AI principles at sanomalearning.com/ai

Contact information

We hope that these main findings from the 2025 Sanoma Learning European Teacher Survey are of interest, and that you have found some valuable insights that could help in understanding the current state and trends expressed by teachers across Europe.

Please reach out if you would like to get in touch for specific questions, more insight in local findings or for potential cooperation with Sanoma Learning to improve everyday life for teachers and students.

Contact

sanomalearning.com