



Summary Analysis Report

REF/C3-ICT-092009

Extract source

This 'Education Market Outlook Series' report contains extracts from the recently released BESA report 'ICT in Schools' which was conducted by C3 Education using our NERP subscriber base of ICT leaders. No copying or other dissemination of the contents of this report may be made without the written permission of BESA.

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Make use of NERP

C3 Education has used its NERP network of key teachers and senior management to obtain comprehensive commercially-relevant survey responses from over 8,000 schools in 2009. NERP is one of the most active market research channels supporting educational providers in the UK.

ICT Provision & Use in 2009/10

The summer holiday and start of the new academic year is a period when many schools have reviewed and begun to implement revised ICT development plans. For some, significant decisions are being made regarding the future of ICT provision and use. These changes need to be placed into context for all state schools across the UK. At a time when ICT providers are reviewing their BETT 2010 product and marketing strategies, timely and accurate market research is vital to inform the process. This summary analysis report offers some insight into the views held by schools as to the value, and likely provision of ICT in 2009 and over the coming year.

The online questionnaire to our extensive panel of ICT co-ordinators and heads of IT was conducted in June 2009. The research team obtained responses from 770 primary and 572 secondary schools across the UK. The research was commissioned by the British Educational Suppliers Association (BESA). The full report comprising of Volume 1: 'Opinions and Trends' and Volume 2: 'Provision and Spending' are available to download in the members' area of BESA's website (www.besa.org.uk).

If you require additional information and analysis on this research or other ICT surveys please email Richard Connor (rconnor@c3education.com) or navigate to our research website on www.nerp.org.uk. Full reports and commentary relating to this body of research is only available to BESA members.

Views on infrastructure provision

Schools continue to invest in ICT, with 51% of primary schools indicating that they are well-equipped with desktop computers, compared to 32% in 2001. An estimated 57% of secondary schools consider themselves to be in the same position – compared to a third in 2001.

For laptop computers, schools continue to feel under-equipped, with only 34% of primary and 36% of secondary schools suggesting that they are well-equipped. This compares to 58% of primary and 48% of secondary schools being well-equipped with internet access and broadband connectivity.

Under-equipped	Primary	Secondary
Desktop computers	6%	16%
Laptop computers	35%	26%
Wireless network*	32%	37%
Broadband	11%	16%

*or not applicable or relevant to needs

Views on PC and internet access

73% of primary and 64% of secondary schools provide teachers with good access to computer equipment for curriculum purposes. Eighty-nine percent of primary schools provide good internet access levels to teachers – 13% more schools than in 2006. Within secondary schools the growth of good internet access for teachers has been slower; 79% compared to 70% in 2006.

In 2001, 30% of primary schools indicated good pupil access to the internet. This increased to 73% in 2006, but has now declined again to 58%. In 2001, 41% of secondary schools indicated that pupils had good internet access compared to 73% in 2008, which has also now declined to 64%.

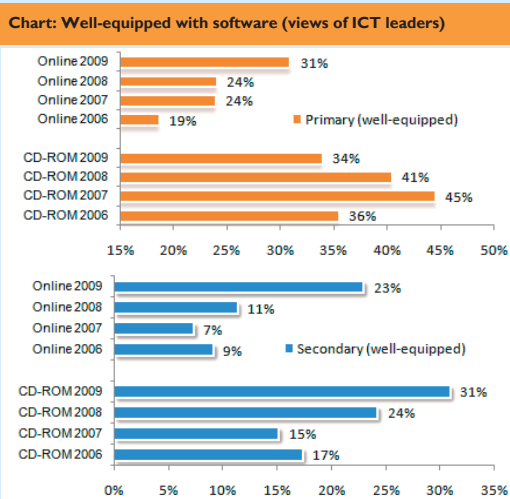
Little access	Primary	Secondary
PCs for pupils	5%	1%
Internet for pupils	10%	7%



Views on software and online content provision

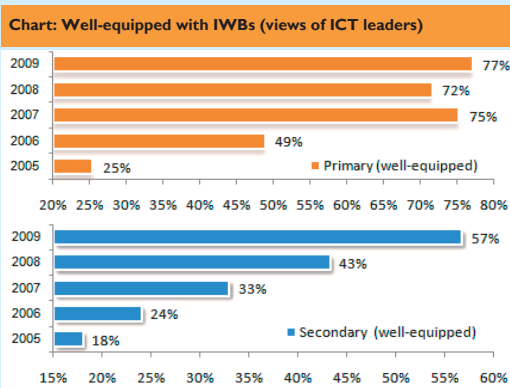
The results for 2009 indicate that 34% of primary school ICT co-ordinators consider themselves to be well-equipped with CD-ROM software. In 2008, fewer than a quarter held the same views for online software and content, which has now increased to 31%.

Across secondary schools there is concern in 2008 that only 11% were well-equipped with online software and content. The 2009 results show a significant improvement, as 23% now feel well-equipped with online digital content.



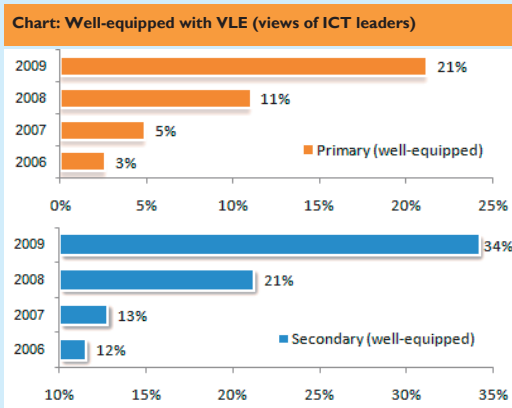
Views on IWB provision

Provision of interactive whiteboards has improved significantly over the past few years. A quarter of primary schools indicated being well-equipped with IWBs in 2005. By 2009 this has increased to 77%. In 2005 only 18% of secondary schools indicated being well-equipped with IWBs, which has now risen to 57%.



Views on learning platform provision

The perceptions of provision for technologies including learning platforms is that many primary schools are not well-equipped; however, there is a significant change in view between the 2006 survey and the results for the 2009 report. While around 17% of primary schools consider learning platforms not to be relevant to their needs – around 21% now indicate being well-equipped – compared to fewer than 3% in 2006. This still leaves more than 30% under-equipped.



A third of secondary schools are likely to consider themselves to be well-equipped with learning platforms – compared to 13% in 2007. Another third are adequately-equipped, which is an improvement on 21% recorded in 2006. Only 4% of secondary schools believe that these systems are not applicable or relevant to their needs.

ICT requirements for 2010

Schools were requested to identify where there is a requirement for additional ICT infrastructure and software within the year ending April 2010.

There is decreased demand for desktop computers in primary and secondary schools – down from around 19% with extensive demand in 2009 to 17% for 2010.

The change in views is mirrored in secondary schools, where 28% had an extensive demand for 2009, which has now decreased to 22% for 2010.

Demand for laptop computers has remained strong with over a third of all schools having an extensive requirement by April 2010.

RESEARCH campaigns planned by BESA in 2009/10*

Resources in English State Schools 10/09

Pupil Technology Use in Primary Schools 11/09

Impact of the 14-19 Agenda on Resourcing 02/10

Early Years Resourcing 02/10

Impact of New Technologies in Schools 03/10

Resourcing in Scottish Schools 05/11

* Contact Richard Connor at C3 Education for more information—
rconnor@c3education.com

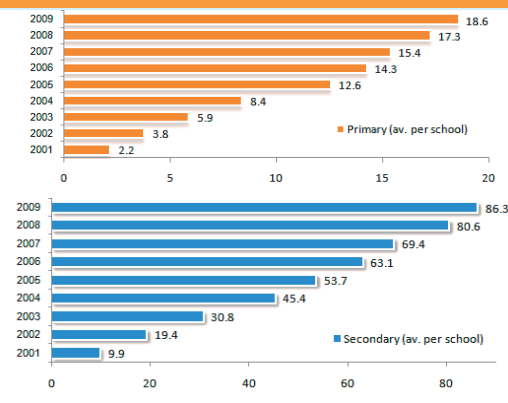


Trends in desktop and laptop computer provision

Primary school desktop computer provision increased by only 3% between 2007 and 2009 to an average of 32.8 desktop computers per school. It is estimated that 89,000 desktop computers will be purchased by primary schools by April 2010 – a similar number to that recorded in 2009.

Laptop computer use in primary schools increased to over 400,000 units – up by 7.5% on 2008 levels. By April 2010, it is expected that an additional 91,000 units will be purchased.

Chart: Trends in laptop computer provision—av. per school



Secondary school provision of desktop computers had remained relatively static between 2004 and 2006. In 2009, over one million desktop computers are available to secondary schools – up by 12.2% from levels recorded in 2007. New purchases to April 2010 are expected to be around 135,000 units – a similar number to 2009. Redundancy rates are increasing, with new purchases in 2010 only increasing typical provision to 242 desktops – up from 241 in 2009.

Laptop provision in secondary schools has increased from an average of 31 units in 2003 to 86 units in 2009, bringing the total in secondary schools to 363,000 units. An additional 68,000 laptops are expected to be purchased by April 2010. An increase in redundancy rates will result in the typical secondary school only increasing provision to 87 laptops.

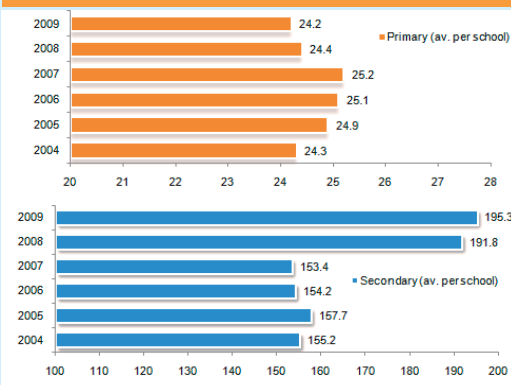
Overall, there are anticipated to be 2.5 million computers in schools during 2010. ICT leaders consider there to be a need for 3.2 million computers to fully implement ICT development plans, which has doubled since 2003.

Computer usage by pupils

The typical UK primary school has 31.8 computers shared by pupils in classrooms and computer labs, compared to 226.2 in secondary schools. Teachers have exclusive access to an average of 10.4 laptops in primary schools and around 49.8 in secondary schools.

There are on average 6.9 pupils per computer in primary schools – down from 7.4 pupils per computer in 2005. In secondary schools there are on average 4.2 pupils per computer – down from 5.5 in 2005.

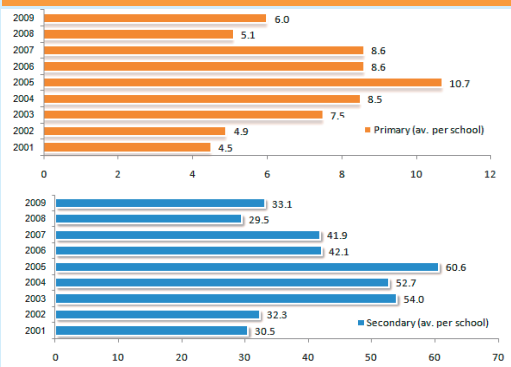
Chart: Desktop computers for use by pupils—av. per school



Ineffective computers

Over a quarter of a million computers are considered ineffective for teaching the curriculum due to either age or specification compared to over 520,000 in 2004. As redundancy rates increase, it is anticipated that the number of ineffective computers will continue to decline.

Chart: Ineffective computers—av. per school



BESA reports* conducted by NERP with ICT focus

School Learning Platform Review	05/09
ICT in Independent Schools	03/09
Impact of New Technologies	06/08
Literacy and Numeracy Resourcing	02/09
Primary Resource Review	06/09
Procurement in English Schools	04/09

*BESA members: Please use your BESA website user account to download these reports.

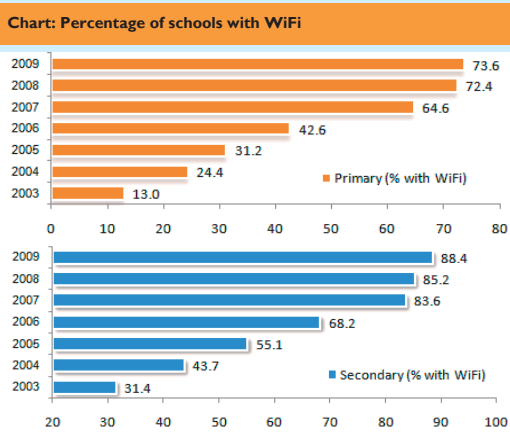


Fixed and wireless network provision

More than 2.3 million networked computers are currently in place, of which over one million are in primary and 1.3 million in secondary schools – around 135,000 more than in 2008.

The typical primary school has 48 networked computers, compared to 316 in secondary schools.

74% of primary and 88% of secondary schools recorded ownership of wireless networking technology in 2009. In addition 6% of primary and 5% of secondary schools intend to commence the use of wireless networking in April 2010.



There are estimated to be around 337,000 computers in primary schools which regularly join a wireless network. Across secondary schools there are estimated to be 326,400 computers which can be joined to an existing school wireless network – an average of 88 computers in those schools.

Peripheral provision

In 2009 there are estimated to be 177,200 interactive whiteboards in primary schools with a further 104,800 in secondary schools – an average of 8.6 units in primary and 25.2 in secondary schools.

There are estimated to be an average of 8.4 printers (laser or inkjet) in primary schools and 20.2 in secondary schools. This equates to around 267,600 printers in 2009 – fewer than in previous years.

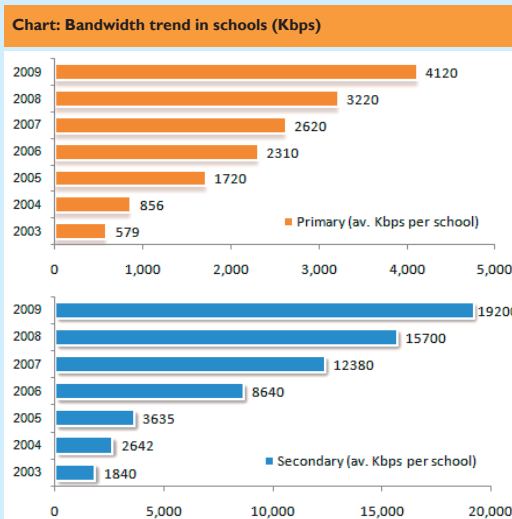
Internet access and bandwidth capacity

Practically all schools have internet-connected computers, with 91% of all primary school computers and 92% secondary school computers able to be connected to the internet.

By 2010 a typical primary school will have 47 internet-connected computers compared to 313 in secondary schools. An estimated additional 54,000 computers will have internet access by April 2010.

Primary schools record an average bandwidth of 4.1Mbps, which is expected to increase to 4.9Mbps by April 2010. For secondary schools the levels are expected to increase from an average of 19.2Mbps to 21.5Mbps by April 2010.

Optimal bandwidth to provide for all requirements still lags behind current provision. Primary schools suggest a bandwidth requirement averaging 13.4Mbps in 2009, even though actual provision is 4.1Mbps. For secondary schools the optimal level is higher at 55.0Mbps, with actual provision less than half this level at 21.5Mbps.



Nearly two-thirds of schools make significant use of the internet for free downloads of online curriculum software or content products, while 42% of primary and 48% of secondary schools make significant use of paid-for online software and content.

The level of significant use is continuing to grow in secondary schools, while primary schools are seeing use remain similar to the previous year.

Insights from other BESA/NERP research

Spending on Resources

In 2009/10 it is estimated that a typical primary school with around 220 pupils, will have a resources budget of £30,500.

For a typical secondary school with 920 students, resource budgets are expected to be in the region of £161,500.

Across all UK state schools this equates to anticipated 2008/09 resource budget availability of £1,197 million.

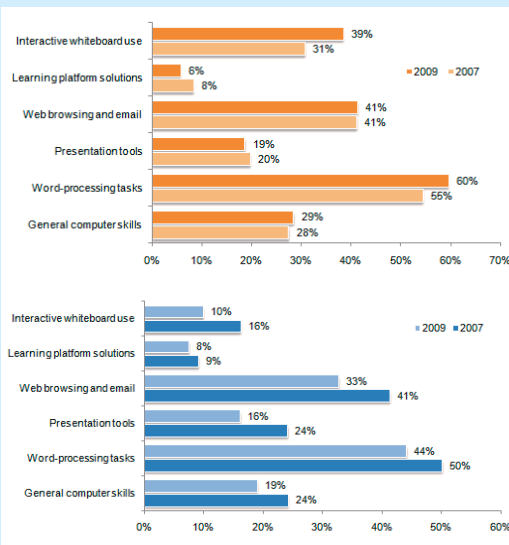


Confidence in using and access to ICT

Seventy percent of primary teachers are considered to be confident and competent using ICT in the curriculum – down from 80% in 2007. The percentage has also decreased in secondary schools with 60% in 2009 being confident and competent using ICT – compared to 68% in 2007.

60% of ICT leaders consider the majority of primary teachers to be very confident in word-processing tasks – in comparison to 44% in secondary schools. This compares to a fifth of primary and 16% of secondary school ICT leaders considering that the majority of teachers are very confident in using presentation tools.

Chart: Confident and competent in ICT use (by task)



59% of primary teachers will receive ICT training in 2009, compared to 67% who expected training in 2008. 55% of secondary teachers will receive training in 2009, compared to 72% in 2007.

For those teachers receiving ICT training, around 71% of primary and 63% secondary school teachers found it very useful, with all but 7% of primary and 9% of secondary school teachers finding it of some use.

80% of primary and 90% of secondary school teachers suggest that limited access to ICT is affecting their use of ICT in the classroom. 39% of primary and 41% of secondary schools indicate limited access to computers in the classroom. This compares to fewer than 2% indicating limited access to computers for lesson preparation.

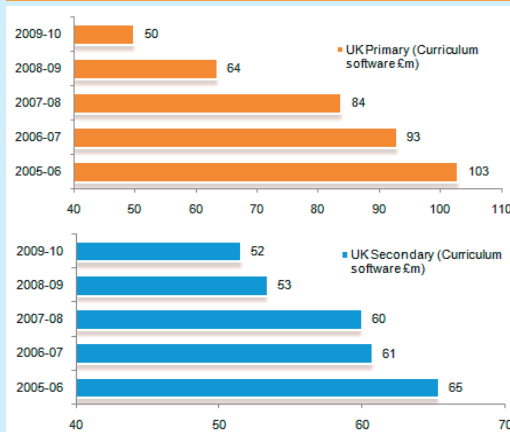
Software and content purchasing

Six percent of primary schools are anticipating budgeting 25% more on curriculum software in 2009-10, compared to 11% in 2006-07. A further 32% are expecting to reduce budgets by a similar percentage. Across secondary schools, 8% are expecting to budget 25% or more on curriculum software – compared to 14% allocating 25% or more in 2008-09.

English primary schools are expected to budget £39 million on curriculum software and digital content in 2009-10. Once all UK state primary schools are included, budgets are estimated at £50 million – down from £103 million in 2005-06.

English secondary schools are expected to budget £45 million on all curriculum software and content in 2009-10. Once all UK state secondary schools are included, budgets are estimated at £52 million, which is down from £65 million in 2005-06.

Chart: Curriculum software spend—UK (£m)



The typical primary school is anticipated to spend £2,300 on curriculum software in 2009-10, while secondary schools plan to spend £12,260. The result is that while secondary school spending will only decline by 3.4%, the level of reduction in spending in primary schools is set to reach 21.5% in 2009-10.

Insights from other BESA/NERP research

Resource expenditure

In 2009/10, it is estimated that there will be expenditure on resources exceeding £1,428 million across state schools in England.

Teaching materials and equipment are expected to take up £318 million of primary and £248 million of secondary school resource expenditure. Furniture will take up another £105 million.



Service profile

C3 Education is a leading provider of online surveys to the educational supply sector.

With the launch of the National Education Research Panel (NERP) in June 2005, our researchers now have access to nearly 16,000 ICT leaders, senior managers and subject co-ordinators with the experience to provide the community with valuable market information.

Our fully customisable survey software, statistical tools and reporting structures offer clients a professional service.

C3 Education has 16 years direct experience surveying schools.

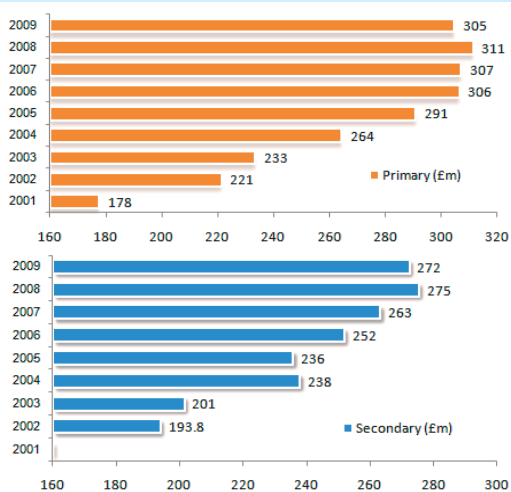
ICT budgets and priorities

Schools are continuing to restrict additional budgets for a broad range of ICT products and services. In 2009-10 UK state schools recorded ICT budgets (excluding curriculum software) of £576.8 million – up by only £18.6 million on 2006-07 levels of £558.2 million.

Primary school ICT budgets are estimated to decrease by 2.2% in 2009-10. Secondary school budgets indicate a reduction of 1.0%. These decreases exclude budgets on curriculum software and digital content. This will result in UK-wide budget allocations declining by £9.8 million.

A typical primary school ICT budget is anticipated to be £13,380 in 2010-11, while secondary budgets are set to decrease to £62,970. This represents declines of 4.4% and 2.7%, respectively. ICT allocations from school budgets are estimated to be around £556 million in 2010-11 – excluding curriculum software and digital content.

Chart: ICT budgets (All UK state schools)



ICT 2010 outlook	Primary	Secondary
ICT budgets / ex. content	£13,380	£62,970
Desktops (av. units)	32.6	242.0
Laptops (av. units)	18.6	87.0
Internet bandwidth	4.8Mbps	21.5Mbps
IWB (av. units)	8.6	25.4

Change in ICT budget allocations for 2010-11

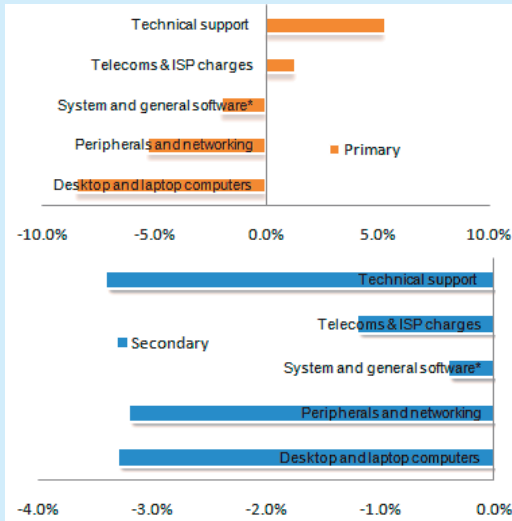
It is anticipated that the average primary school will spend £5,350 on desktop and laptop computers in 2010-11 – down from £5,850 in 2009-10 – representing a decline of 8.5%.

For primary schools growth in budgets for desktop computers is expected to decline by 8.5%, while secondary schools are set to spend 3.4% less than in 2009-10.

Budgets for peripherals and networking are expected to decline by 5.3% across primary and 3.2% across secondary schools during 2010-11. The average primary school will allocate £2,700 for this category of spend, which compares to £10,600 for the average secondary school.

It is expected that budgets for system and general software will decline by 2.0% across primary schools and 0.4% across secondary schools.

Chart: Anticipated budgets for 2010-11 (av. per school)



Express your views and find out more from NERP/BESA

If you wish to receive more information on this research project or any other research focusing on ICT in schools and colleges please link to...

<http://www.nerp.org.uk>

If you wish to receive more information on the UK's education system visit the British Educational Suppliers Association (BESA) website on...

<http://www.besa.org.uk>



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