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C3 education

Summary Analysis Report

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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.

Make use of NERP

C3 Education has used its NERP network of key educators to obtain comprehensive commercially-relevant survey responses from over 10,000 senior teachers in 2010. NERP is one of the most active market research channels supporting education providers in the UK.

BESA

September 2010 Education Market Outlook Series

ICT Provision & Use in 2010/11

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 2011 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 2010 and over the coming year.

The online questionnaire to our extensive panel of ICT co-ordinators and heads of IT was conducted in June and July 2010. The research team obtained responses from 812 primary and 567 secondary schools across the UK. The research was commissioned by the British Educational Suppliers Association (BESA). The full report comprising of Volume I: 'Opinions and Trends' and Volume II: 'Provision and Spending' are available to download in the members' area of BESA's website (www.besa.org.uk).

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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 are only available to BESA members.

Views on infrastructure provision

Schools continue to invest in ICT, with 58% of primary schools indicating that they are well-equipped with desktop computers, compared to 32% in 2001. An estimated 64% 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 43% of primary and 41% of secondary schools suggesting that they are well-equipped. This compares to 68% of primary and 55% of secondary schools being well-equipped with internet access and broadband connectivity.

Under-resourced	Primary	Secondary
Desktop computers	42%	36%
Laptop computers	57%	59%
Wireless network*	48%	54%
Broadband	32%	45%

*or not applicable or relevant to needs

Views on PC and internet access

71% of primary and 70% of secondary schools provide teachers with good access to computer equipment for curriculum purposes. Eighty-eight 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; 75% 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 55%. In 2001, 41% of secondary schools indicated that pupils had good internet access compared to 73% in 2008, which has now also declined to 60%.

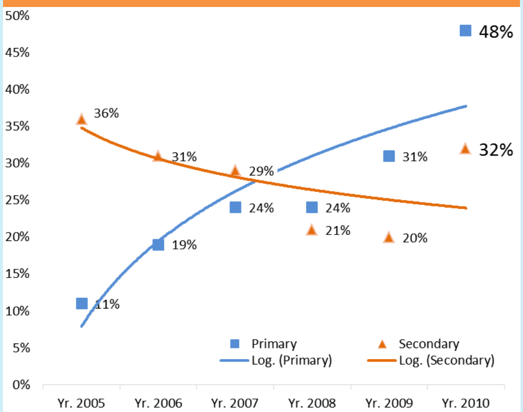
Little access	Primary	Secondary
PCs for pupils	5%	2%
Internet for pupils	10%	6%

Views on digital content provision

The results for 2010 indicate that 48% of primary school ICT leaders consider themselves to be well-resourced with digital content. In 2008, fewer than a quarter held the same view.

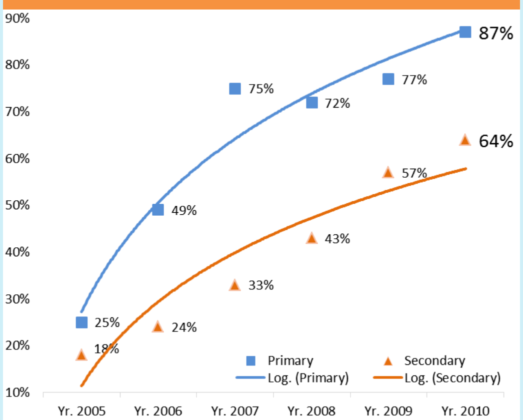
Across secondary schools the 2009 results showed that 23% felt well-resourced with digital content. The 2010 results report the percentage increasing significantly to 32% of schools. ICT leaders report an expected improvement in 2011 of 14%, bringing the percentage of secondary schools being well-resourced to 46%.

Chart: Well-resourced with digital content



Views on IWB provision

Chart: Well-resourced with IWBs

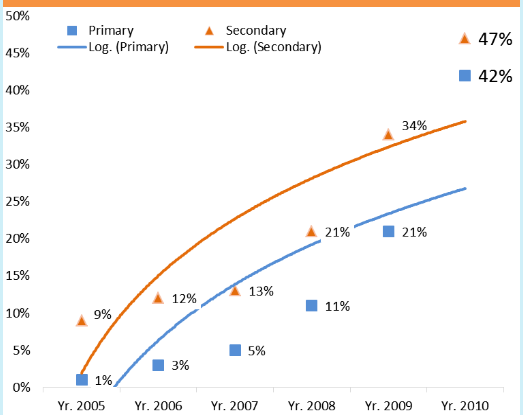


Provision of interactive whiteboards has improved significantly over the past few years. A quarter of primary schools indicated being well-equipped with IWBs in 2005. By 2010 this has increased to 87%. In 2005 only 18% of secondary schools indicated being well-equipped with IWBs, which has now risen to 64%.

Views on learning platform provision

There has been a significant change in views between the 2006 survey and the 2010 results. While around 12% of primary schools consider learning platforms not to be relevant to their needs – around 42% now indicate being well-resourced – compared to fewer than 3% in 2006. By 2011 it is still expected that 30% will continue to be under-resourced.

Chart: Well-resourced with learning platforms



Forty-seven percent of secondary schools are likely to consider themselves to be well-resourced with learning platforms – compared to 13% in 2007. An additional 28% indicate being well-resourced in 2011, which will leave 30% of secondary schools under-resourced.

ICT requirements for 2011

Schools were requested to identify where there is a requirement for additional ICT infrastructure and software within the year ending April 2011.

There is decreased demand for desktop computers in primary schools – down from around 19% with extensive requirements in 2009 – to 12% for 2011.

The change in views is mirrored in secondary schools, where 28% had extensive requirements in 2009. This has now decreased to 16% for 2011.

Demand for laptop computers has remained strong with around a third of all schools having an extensive requirement by April 2011.

An extensive requirement for network infrastructure is required by over a fifth of schools.

RESEARCH campaigns planned by BESA in 2010/11*

Resources in English Maintained Schools	01/11
Assessment Activities and Resourcing in Schools	12/10
Traditional Resources in Primary Schools	11/10
Impact of New Technologies in Schools	02/11

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

Call Ray Barker
t. +44 (0)20 7537 4997 / e. ray@besa.org.uk

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Trends in desktop and laptop computer provision

Primary school desktop computer provision declined by between 2009 and 2010 to an average of 30.8 desktop computers per school. It is estimated that 75,000 desktop computers will be purchased by primary schools by April 2011 – a reduction of 9%.

Laptop computer use in primary schools increased to an estimated 424,000 units. By April 2011, it is expected that an additional 91,000 units will be purchased – a reduction of 4%.

Secondary school provision of desktop computers had remained relatively static between 2004 and 2006. Significant increases between 2006 and 2009 resulted in over one million desktop computers being available to secondary schools.

A small reduction in the average number of desktop computers per school from 240.6 to 238.7 occurred between 2009 and 2010.

New purchases to April 2011 are expected to be around 117,000 units – a reduction of 10% on 2010 levels. Redundancy rates are also increasing, with new purchases in 2011 decreasing typical provision to 228 desktops – a reduction of -4.5%. This will bring the number of desktop computers back to the one million mark.

Laptop provision in secondary schools has increased from an average of 31 units in 2003 to 86 units in 2010, bringing the total in secondary schools to 370,000 units.

An additional 68,000 laptops are expected to be purchased by April 2011. An increase in redundancy rates will result in the typical secondary school only increasing provision to 86 laptops – a rise of +1.7%.

Overall, there are anticipated to be 2.5 million computers in schools during 2010. Compared to 2005 there are half-a-million more computers, of which a high proportion are laptop computers.

ICT leaders consider there to be a need for 3.2 million computers to fully implement ICT development plans, which has doubled since 2003.

The gap is anticipated to increase from 730,000 computers in 2010 to 840,000 computers in 2011. On average the gap equates to 25 computers in primary and 62 computers in secondary schools.

Computers more than 5 years-old

The average primary school has 7.3 desktop computers that are more than five-years old – a reduction from 9.2 computers in 2007. Across secondary schools the average is 49 desktop computers—compared to 36 in 2007. With the age of desktop computers in secondary schools increasing, it is estimated that more than a fifth of all desktop computers are more than five-years old.

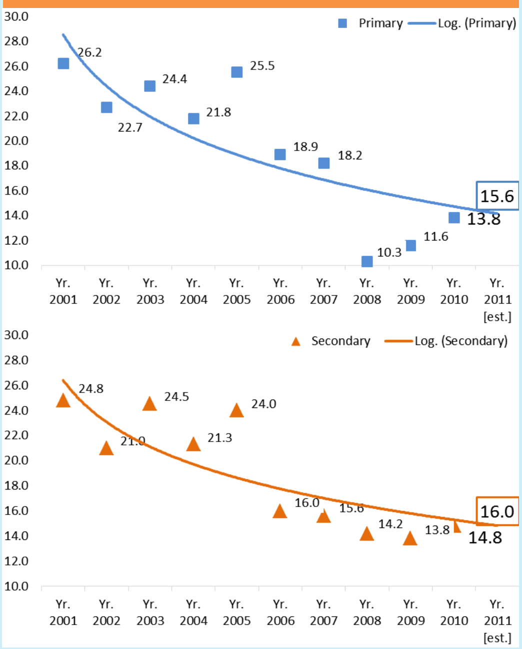
It is less likely that laptop computers are more than five-years old. It is estimated that 16% of primary and 13% of secondary school laptop computers are more than five years-old.

Ineffective computers

An estimated 365,000 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 and new purchasing declines, it is anticipated that the number of ineffective computers will commence climbing again.

An average primary school has seven ineffective computers, equating to 14% of total provision. In secondary schools the percentage is 15%, with an average of 48 ineffective computers.

Chart: Ineffective computers: average per school



BESA reports* conducted by NERP with ICT focus

School Learning Platform Review	05/09
ICT in Independent Schools	03/09
Resources in Scottish Schools	07/10
ICT Use by Primary Pupils at School and at Home	02/10
School Learning Platform Review	06/09
Procurement in English Schools	04/09

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

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 15,000 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 17 years direct experience surveying schools.

Insights from other BESA/NERP research

Spending on Resources

In 2010/11 it is estimated that a typical primary school with around 220 pupils, will have a resources budget of £29,000.

For a typical secondary school with 920 students, resource budgets are expected to be in the region of £149,000.

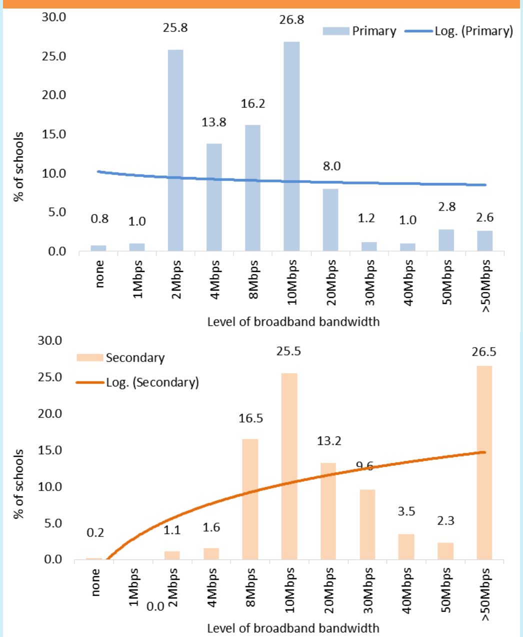
Across all UK state schools this equates to anticipated 2010/11 resource budget availability of £1.3 billion.

Internet access and bandwidth capacity

In 2010 a typical primary school has 46 internet-connected computers compared to 310 in secondary schools. An estimated additional 50,000 computers will have internet access by April 2011.

Primary schools record an average bandwidth of 9Mbps. For secondary schools the average is 31Mbps. The average hides a wide range of provision from 1Mbps to those with 100Mbps.

Chart: Current level of internet bandwidth (Mbps)



Optimal bandwidth to provide for all requirements continues to lag behind current provision. Primary schools suggest an ideal bandwidth requirement averaging 29Mbps, even though actual provision for over a quarter of primary schools is currently 2Mbps or below. For secondary schools the ideal level is higher at 68Mbps, with current provision for about a fifth being 8Mbps or below.

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...

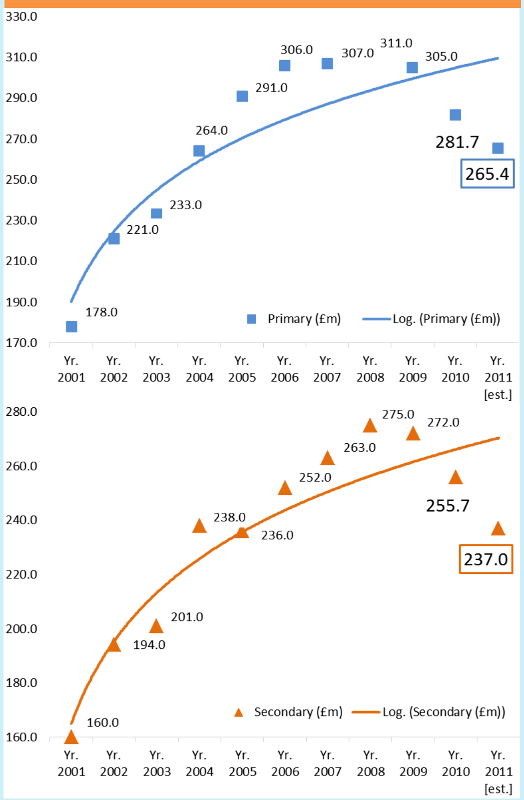
http://www.besa.org.uk

ICT budgets in 2010 and projections for 2011

In recent years schools have continued to expand budgets for a broad range of ICT products and services. In 2009 UK state schools recorded ICT budgets (excluding curriculum software and digital content) of £577 million – up by £50 million on 2005 levels of £527 million.

Since 2009 there has been a reduction in average recorded budgets by both primary and secondary schools. Budgets for 2010 are estimated to be £23 million less in primary and £17 million across secondary schools. On a per-school basis, this equates to an average reduction in 2010 of about £1,000 per primary and £4,000 per secondary school.

Chart: ICT budgets (All UK state schools)



For 2011 there is anticipated to be a further decline in ICT budgets to £502 million from £537 million in 2010. The reduction in budgets in primary schools is forecast to be nearly 6% lower, while across secondary schools ICT budgets are forecast to be 7% lower. Hence, the average primary ICT budget will be £12,200 and for the average secondary school it will be £56,200.