



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.

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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 7,000 schools in 2008. NERP is one of the most active market research agencies supporting educational providers in the UK.

ICT Provision & Use in 2008/09

The summer vacation and 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 activities for BETT and 2009 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 2008 and over the coming year.

The online questionnaire to our extensive panel of ICT co-ordinators and heads of IT was conducted in June 2008. The research team obtained responses from 764 primary and 562 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 piece of 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 52% of primary schools indicating that they are well-equipped with desktop computers, compared to 32% in 2001. Sixty percent 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 29% of primary and 27% of secondary schools suggesting that they are well-equipped. This compares to 60% of primary and 46% of secondary schools being well-equipped with internet access and broadband connectivity.

Under-equipped	Primary	Secondary
Desktop computers	8%	12%
Laptop computers	31%	33%
Wireless network*	44%	47%
Broadband	5%	13%

Views on PC and internet access

77% of primary and 66% of secondary schools provide teachers with good access to computer equipment for curriculum purposes. Ninety percent of primary schools provide good internet access levels to teachers – 14% more schools than in 2006. Within secondary schools the growth of good internet access for teachers has been slower; 82% compared to 70% in 2006.

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

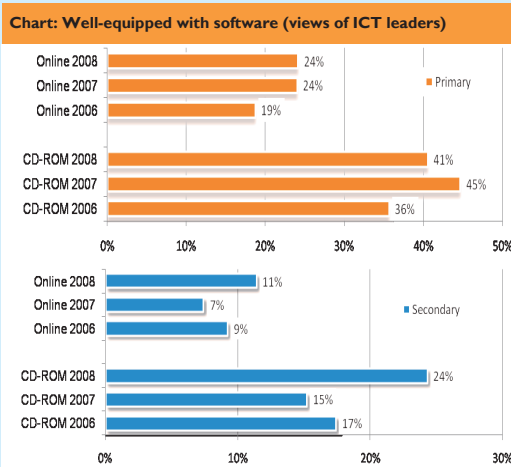
Little access	Primary	Secondary
PCs for pupils	4%	1%
Internet for pupils	6%	3%



Views on software and online content provision

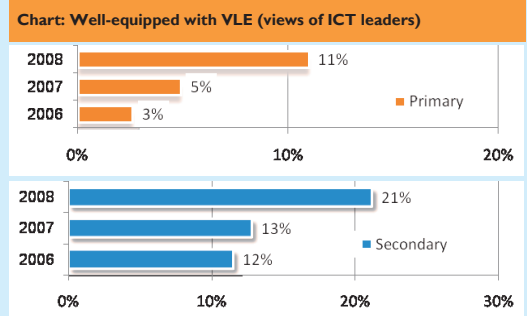
The results for 2008 indicate that 41% of primary school ICT co-ordinators consider themselves to be well-equipped with CD-ROM software. Fewer than a quarter hold the same views for online software and content. Views have not altered significantly over the past two years.

Across secondary schools there is concern that only 11% are well-equipped with online software and content. This compares with a quarter being well-equipped with CD-ROM titles.



Views on learning platform provision

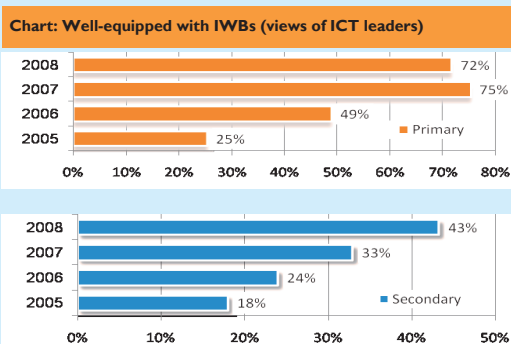
The perceptions of provision for technologies including VLEs and assessment systems are that the vast majority of primary schools are not well-equipped. There is a significant change in views between the 2006 survey and the results for the 2008 report. While around a fifth of primary schools consider VLE solutions not to be relevant to their needs – around 11% now indicate being well-equipped – compared to fewer than 3% in 2006. This still leaves more than 40% under-equipped.



A fifth of secondary schools are likely to consider themselves to be well-equipped with VLE and assessment systems – compared to 13% in 2007. Over 40% are adequately-equipped, which is an improvement on the 21% recorded in 2006. Only 6% of secondary schools believe that these systems are not applicable or relevant to their needs.

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 2008 this has increased to 72%. In 2005 only 18% of secondary schools indicated being well-equipped with IWBs. This has now risen to 43%.



ICT requirements for 2009

Schools were requested to identify where there is a requirement for additional ICT infrastructure and software within the year ending April 2009.

There is increased demand for desktop computers in primary and secondary schools—up from around 8% with extensive demand in 2008 to 19% for 2009.

The change in views is mirrored in secondary schools where 15% had an extensive demand for 2008, which has now increased to 28% for 2009. Demand for laptop computers has remained strong with nearly a third of all schools having an extensive requirement for 2009.

RESEARCH campaigns planned by NERP in 2008/9*

Wireless Technologies in UK Schools 02/09

ICT in Independent Schools 03/09

Personalised Learning Technologies in Schools 04/09

Digital Content Use in Secondary Schools 05/09

ICT in Further Education 05/09

Financing Technology in Schools—a review 06/09

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

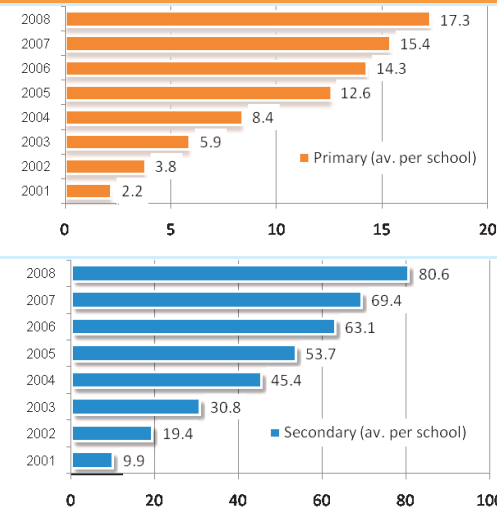


Trends in desktop and laptop computer provision

Primary school desktop computer provision increased by 2% between 2007 and 2008 to an average of 32.4 desktop computers per school. It is estimated that 124,700 desktop computers will be purchased by primary schools by April 2009 – double that of the previous year.

Laptop computer use in primary schools increased to nearly 400,000 units – up by 12.2% on 2007 levels. By April 2009, it is expected that an additional 127,300 units will be purchased.

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



Secondary school provision of desktop computers had remained relatively static over the previous two years. In 2008, over one million desktop computers are available to secondary schools – up by 8.3%. New purchases to April 2009 are expected to be around 180,000 units – a similar number to 2008. Redundancy rates are increasing; however the new purchases still result in about 80,000 new additions for 2008 and 2009.

Laptop provision in secondary schools has increased from an average of 31 units in 2003 to nearly 81 units in 2008, bringing the total in secondary schools to 355,400 units. An additional 75,000 laptops are expected to be purchased by April 2009.

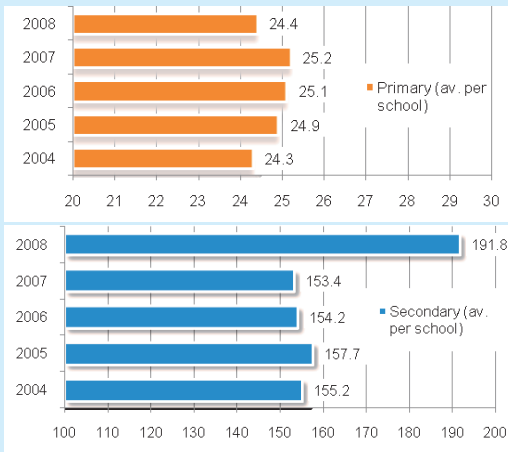
Nearly a quarter of a million computers are considered ineffective for teaching the curriculum due to either age or specification compared to over 520,000 in 2004.

Computer usage by pupils

The typical UK primary school has 30.8 computers shared by pupils in classrooms and computer labs, compared to 217.6 in secondary schools. Teachers have exclusive access to an average of 10.3 laptops in primary schools and around 49.4 in secondary schools.

There is an average of 7.7 pupils per computer in primary schools – down from 8.8 pupils per computer in 2004. In secondary schools there is an average 4.3 pupils per computer – down from 5.3 in 2004.

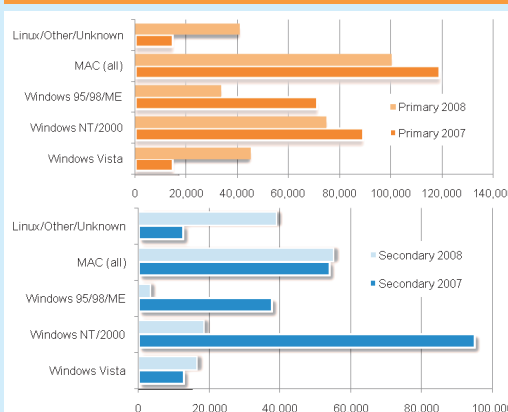
Chart: Desktop computers for use by pupils—av. per school



Operating system use

Windows XP is the most significant operating system used in schools, with 2.1 million of the 2.5 million desktop and laptop computers in UK state schools using Windows XP – 84% of all desktop computers. Below is an estimate of the other operating systems.

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



BESA reports* conducted by NERP with ICT focus

Resources in Independent Schools 07/08

Impact of New Technologies in English 05/08

Resourcing KS3 in English Schools 04/08

Resources in English State Schools 01/08

ICT & E-learning in Further Education 09/07

Wireless Technologies in Schools (WiFi) 08/07

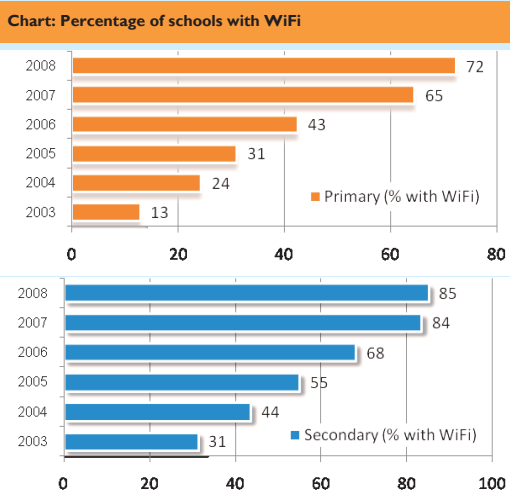
*BESA members: Please use your BESA website user account to download these reports.

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 240,000 more than in 2007.

The typical primary school has 47 networked computers, compared to 294 in secondary schools.

72% of primary and 85% of secondary schools recorded ownership of wireless networking technology in 2008. In addition 7% of primary and 5% of secondary schools intend to commence the use of wireless networking in April 2009.



There are estimated to be around 381,000 computers in primary schools which regularly join a wireless network. Across secondary schools there are estimated to be 355,000 computers which can be joined to an existing school wireless network – an average of 94 computers in those schools.

Interactive whiteboard provision

In 2008 there are estimated to be 184,000 interactive whiteboards in primary schools with a further 106,900 in secondary schools – an average of 8.6 units in primary and 24.6 in secondary schools.

In 2008 there are estimated to be 223,000 digital data projectors in primary schools with a further 152,100 in secondary schools – an average of 10.0 units in primary and 33.8 in secondary schools.

Internet access and bandwidth

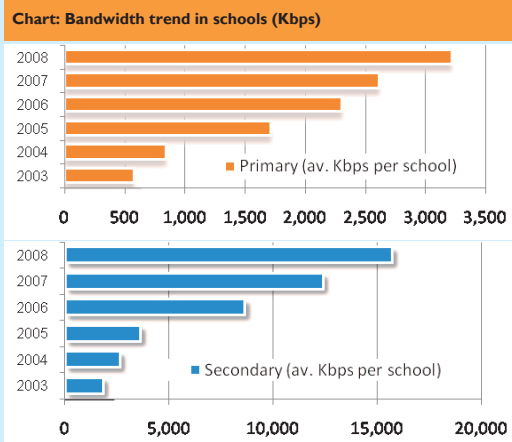
Practically all schools have internet-connected computers, with 85% of all primary school computers and 92% secondary school computers able to be connected to the internet.

By 2009 a typical primary school will have 50 internet-connected computers compared to 322 in secondary schools. An estimated additional 374,000 computers will have internet access by April 2009.

Primary schools record an average bandwidth of 3.2Mbps, which is expected to increase to 4.1Mbps by April 2009. For secondary schools the levels are expected to increase from an average of 15.7Mbps to 21.1Mbps by April 2009.

It is anticipated that by April 2009, a typical primary school will have 64 pupils who can connect concurrently to interactive websites based on 64Kbps per user. For a typical secondary school the number of pupils is expected to average 330.

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 likely to 4.1Mbps. For secondary schools the optimal level is higher at 55.0Mbps, with actual provision likely to be more than half this level at 21.1Mbps.



Nearly two-thirds of schools make significant use of internet for free downloads of online curriculum software or content products, while 43% of primary and 38% of secondary schools make significant use of paid-for online software and content.

Insights from other BESA/NERP research

Spending on Resources

In 2008/09 it is estimated that a typical primary school with around 240 pupils, will have a resources budget of £30,000.

For a typical secondary school with 920 students, resource budgets are expected to be in the region of £156,000.

Across all UK state schools this equates to anticipated 2008/09 resource budget availability of £1,170 million.

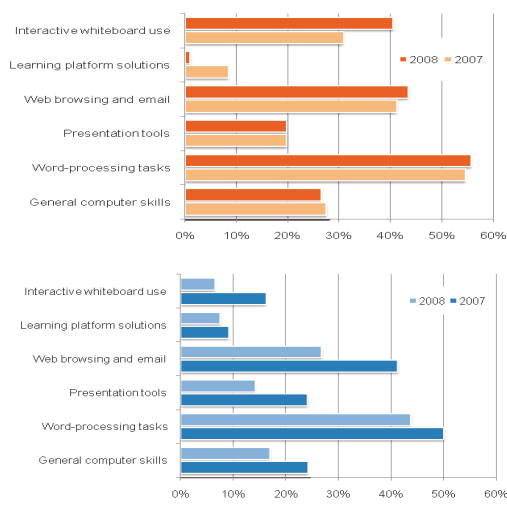


ICT budgets and priorities

Three-quarters 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 61% in 2008 being confident and competent using ICT – compared to 68% in 2007.

56% of ICT managers 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 14% of secondary school ICT managers considering that the majority of teachers are very confident in using presentation tools.

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



67% of primary teachers will receive ICT training in 2008, compared to 68% who expected training in 2007. 59% of secondary teachers will receive training, compared to 72% in 2007.

For those teachers receiving ICT training, around 62% of primary and 65% secondary school teachers found it very useful, with all but 7% of primary and 14% 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. 17% of primary and 27% of secondary schools indicate limited access to interactive whiteboards. This compares to fewer than 3% indicating limited access to computers for lesson preparation.

Software and content purchasing

Five percent of primary schools are anticipating spending 25% more on curriculum software in 2008-09, compared to 11% in 2006-07. A further 21% are expecting to reduce spending by a similar percentage. Across secondary schools, 10% are expecting to spend 25% or more on curriculum software – compared to 19% spending a similar percentage less on software in 2008-09.

English primary schools are expected to spend £67 million on curriculum software and content in 2008-09, of which £8 million is expected to be paid for by eLC allocations which end five months into the financial year. Once all UK state primary schools are included, spend is estimated at £80 million – down from £88 million in 2007-08.

English secondary schools are expected to spend £48 million on all curriculum software and content in 2008-09 of which £6 million will be paid for by eLC allocations. Once all UK state secondary schools are included, spend is estimated at £62 million – down from £64 million in 2007-08.

Chart: Curriculum software spend—England (£m)

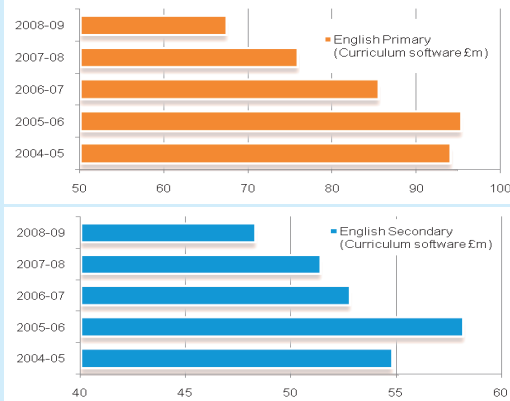
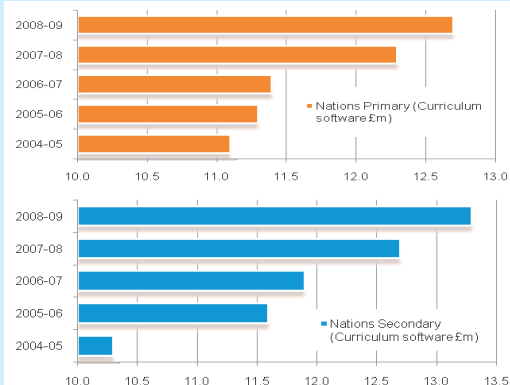


Chart: Curriculum software spend—Nations (£m)



Insights from other BESA/NERP research

Resource expenditure

In 2008/09, it is estimated that there will be expenditure on resources exceeding £1,370 million across state schools in England.

Teaching materials and equipment is expected to take up £304 million of primary and £240 million of secondary school resource expenditure. Furniture will take up another £103 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 18,000 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 15 years direct experience surveying schools.

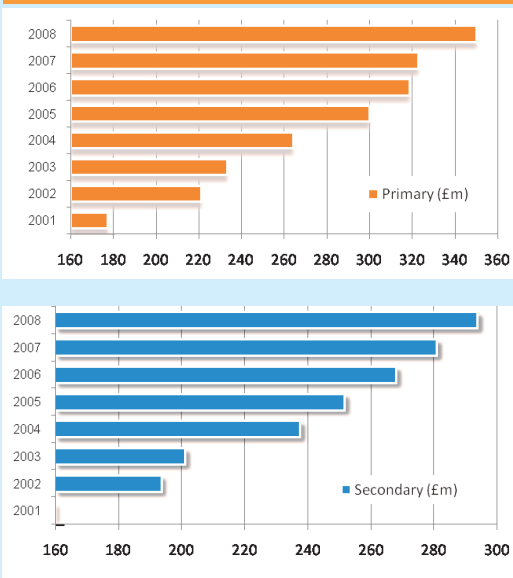
ICT budgets and priorities

Schools continue to invest heavily in a broad range of ICT products and services. In 2007-08 UK state schools recorded ICT budgets (excluding curriculum software) of £614 million – up by £27m on 2006-07 levels.

Primary school ICT budgets are estimated to increase by 8.4% in 2008-09. Secondary school budgets indicate growth at 5.1%. These increases exclude spending on eLCs. This will result in UK-wide budget allocations of £644 million in 2008-09 and an increase of £40 million.

A typical primary school ICT budget is anticipated to be £15,850 in 2009-10, while secondary spend is set to increase to £68,000. This represents an increase of 6.2% and 4.0%, respectively. Spend on ICT from school budgets is estimated to be around £672 million in 2009-10 – excluding curriculum software/eLC spending.

Chart: ICT budgets (All UK state schools)



Change in ICT budget allocations for 2009-10

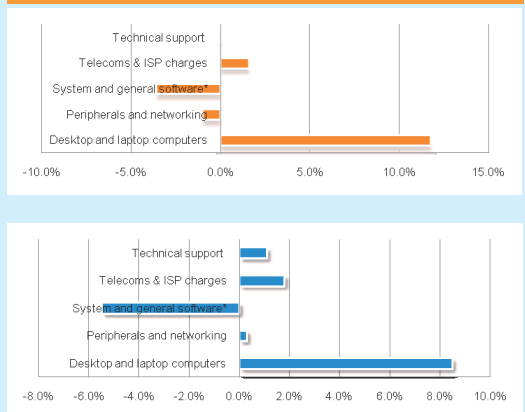
It is anticipated that the average primary school will spend £7,300 on desktop and laptop computers in 2009-10 – up from £6,540 in 2008-09 and represents growth of 12%.

For secondary schools growth in budgets for desktop computers and peripherals is expected to reach nearly 9%. The average secondary school will budget £36,000 in 2009-10 – up from £33,200 in 2008-09.

Budgets for peripherals and networking are not expected to change significantly in 2009-10. The average primary school will allocate £3,000 for this category of spend (down 1% on 2008-09). This compares to £11,500 for the average secondary school.

It is expected that budgets for system and general software will decline by 3.6% across primary schools and 5.5% across secondary schools.

Chart: Anticipated budgets for 2009-10 (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>

ICT 2009 outlook	Primary	Secondary
ICT budgets / ex. content	£15,850	£68,000
Desktops (av. units)	35.0	243.4
Laptops (av. units)	19.8	88.8
Internet bandwidth	4.1Mbps	21.1Mbps
IWB (av. units)	8.8	25.0



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