

2020



COVID-19 update

School re-opening dates and
impact on resource
spending

| Spending outlook in (quarterly and calendar year)

Primary and secondary maintained schools in England
NERP#644.3: 2020

 researching.education

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This market update assesses the impact of school closures on spending on the full range of products and services purchased by schools over the calendar year – covering all ICT and non-ICT learning resources, administrative and furniture requirements. Overall spending each quarter is evaluated based on when schools partially or fully reopen.

Research conducted with head teachers from 23 to 28 April identifies likely opening dates being the last week of May, or the first week of June, although some establishments thought that a longer timescale was likely.

Although a relatively small number of schools were surveyed, it is interesting to note the differences in spending expectations based on when a school is likely to re-open (either partially or fully).

respondents



339

primary SLTs

211

secondary SLTs



In each of the selected anticipated weeks of opening the impact on Q2 spending growth intentions (Apr/May/Jun) deteriorates after the week of 1 June. And if schools only opened for a few weeks before the end of normal term time, the impact on Q2 spending would be negative. This negativity is likely to drive 2020 calendar year spending negative.

The reason given for the uplift in spending in Q2 (Apr/May/Jun) for the week beginning either 25 May or 1 June is that this is the most anticipated range of dates, with more schools preparing spending, both to open for a 7-8 week onsite term and 5-6 week home learning period, of which both require different types of spending.

For home learning there is the requirement for teacher and pupil laptops, digital learning solutions and content, while physical resources, especially cleaning materials, will be required once pupils return. If schools only open close to the very end of term it is unlikely to require as much physical resourcing for only some pupils returning for a short period.

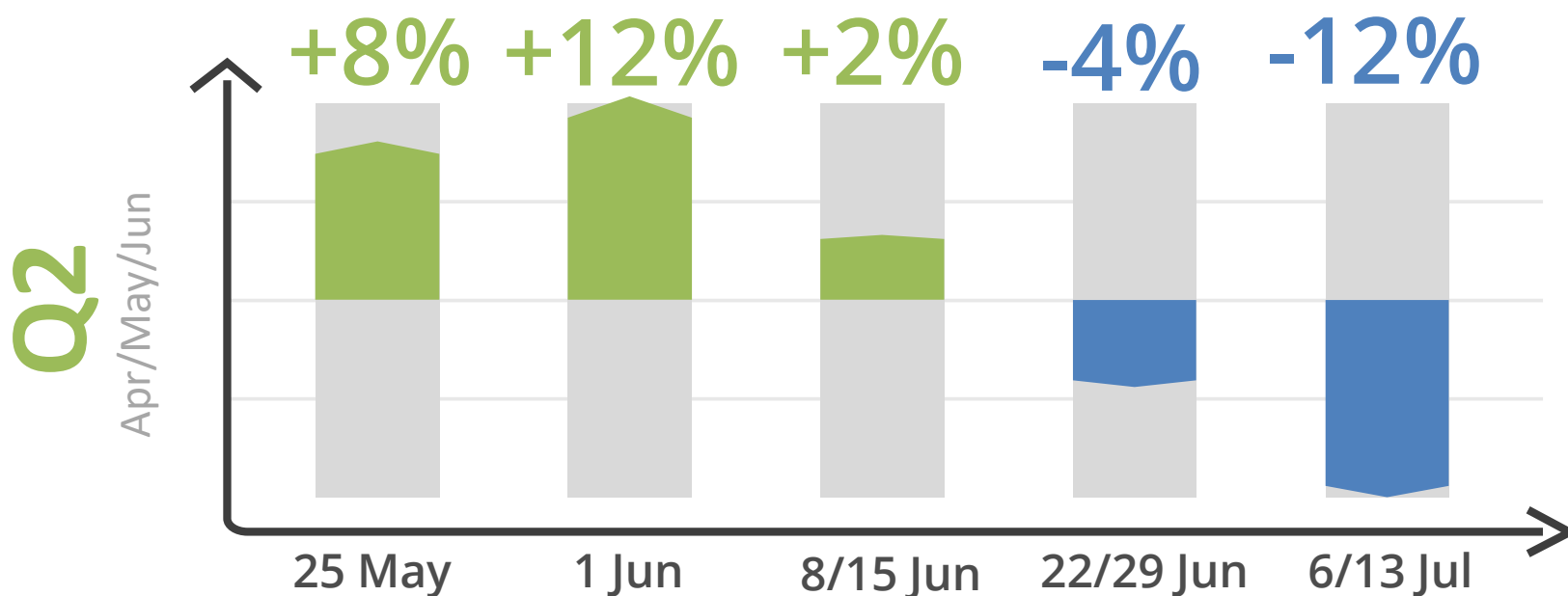


ENGLAND



Impact of Q2 spending by opening date

The majority of schools anticipate opening either the week of 25 May or 1 June, with Q2 spending being positive in both scenarios. However, as the opening date extends, spending in Q2 is likely to turn strongly negative.



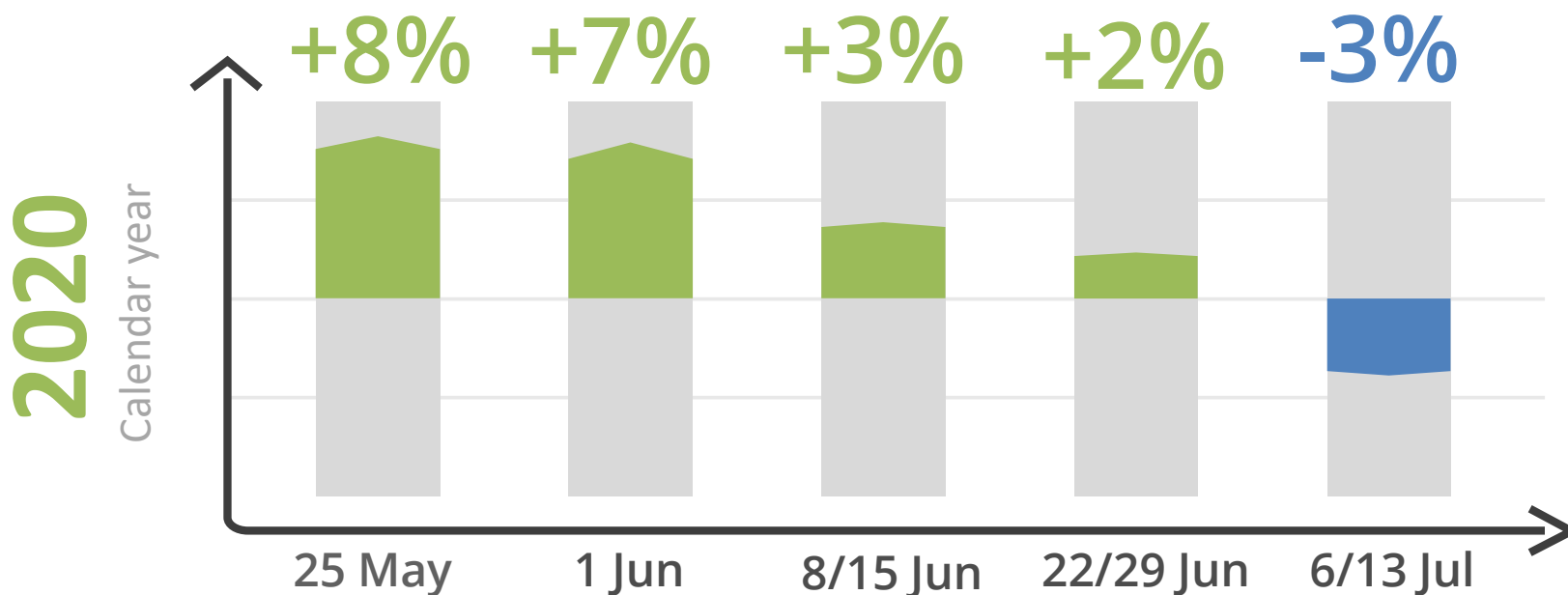


ENGLAND



Impact of annual spending by opening date

Once the full calendar year spending is mapped, the impact of school opening dates is less significant as Q3 and Q4 sales compensate. However, the later the opening date the more likely annual spending will turn negative for the year.





ENGLAND



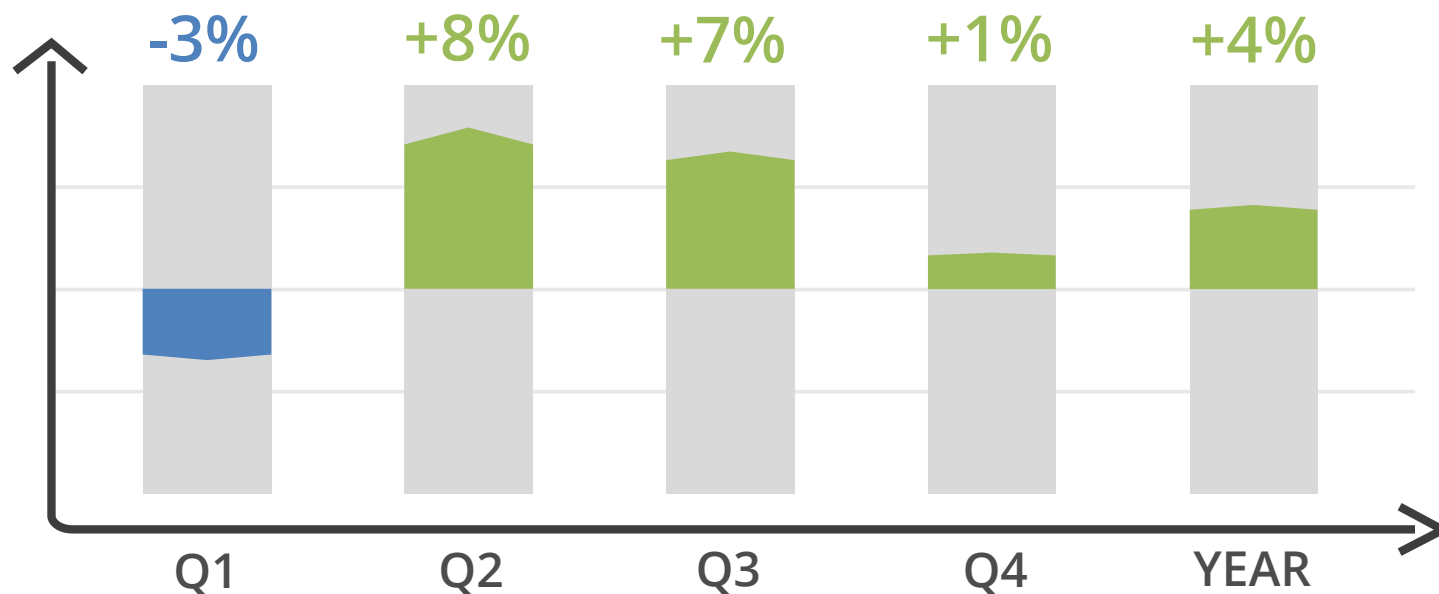
Re-opening week of 25 May

If schools open from 25 May the impact on Q2 spending is likely to be limited. Even though spending on curriculum and stationery items will be impacted, it is somewhat offset by spending on consumables.

25
May

2020

Calendar year





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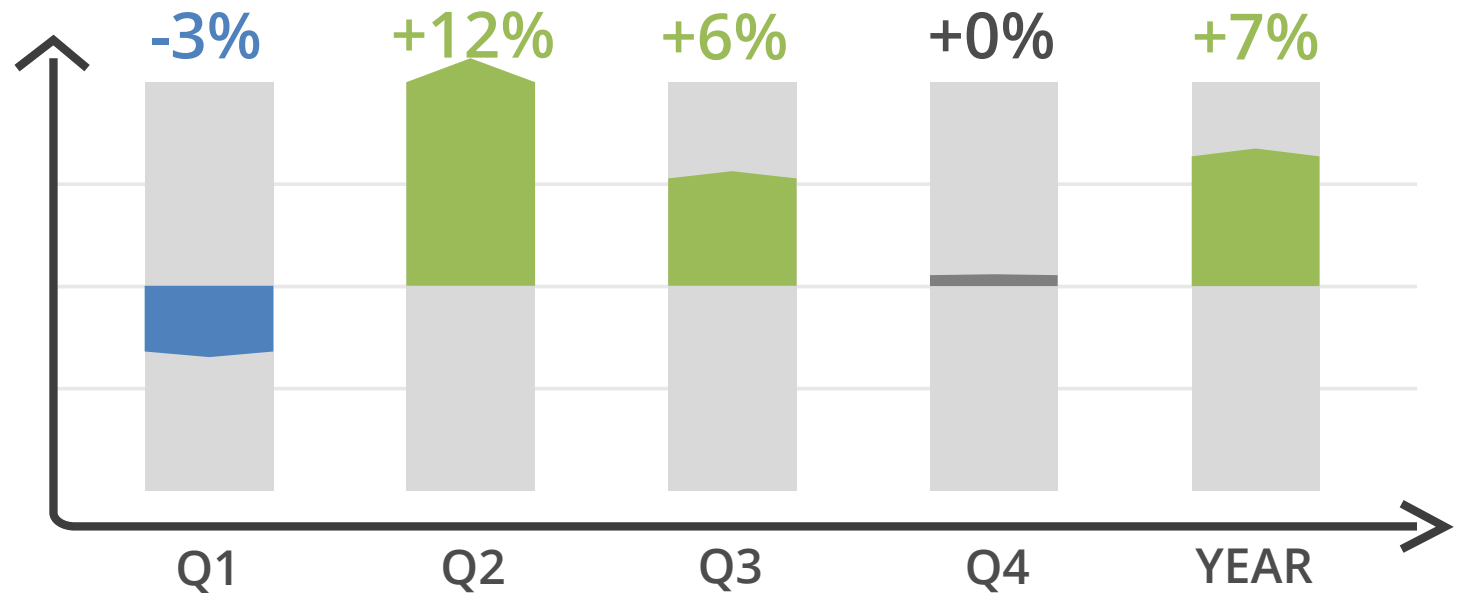


Re-opening week of 1 June

If schools open from 1 June the impact on Q2 spending is likely to reach its most positive position, with both Q2 and Q3 spending being strongly positive. However, Q4 spending (Oct/Nov/Dec) is likely to be static.

2020

Calendar year

1
June



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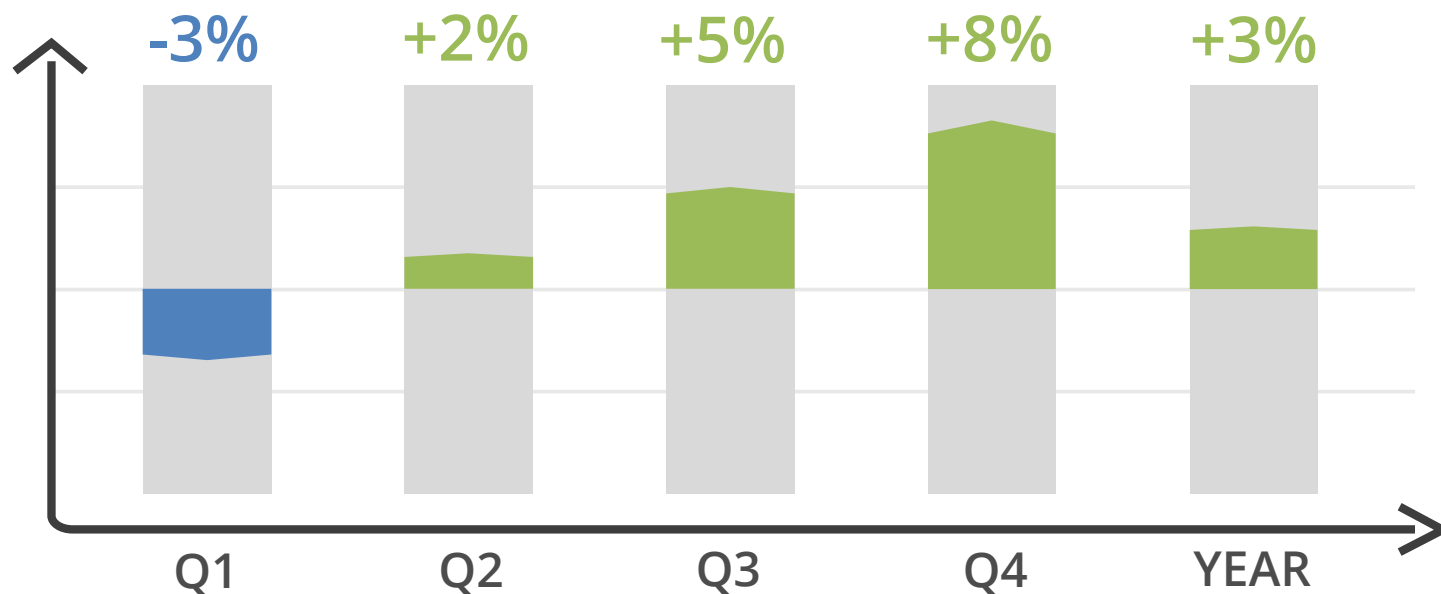


Re-opening week of 8 or 15 June

If schools open from either 8 or 15 June the impact on spending in Q2 is expected to improve only marginally. However, for the schools in this group, there is more positivity about higher spending later in the year.

2020

Calendar year

8/15
June



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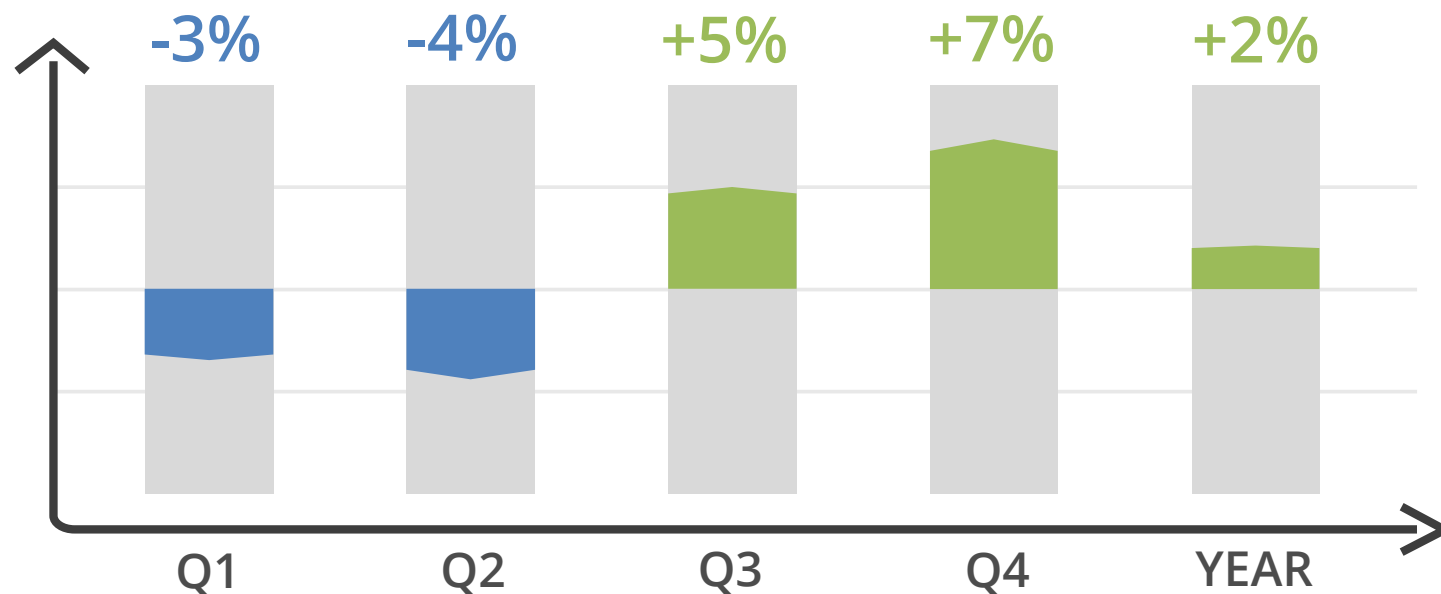


Re-opening week of 22 or 29 June

If schools do not open until the last two weeks of June then the impact on Q2 spending is likely to turn negative. However, positive spending intentions for the remainder of the year is likely to maintain spending in positive territory.

2020

Calendar year

22/29
June



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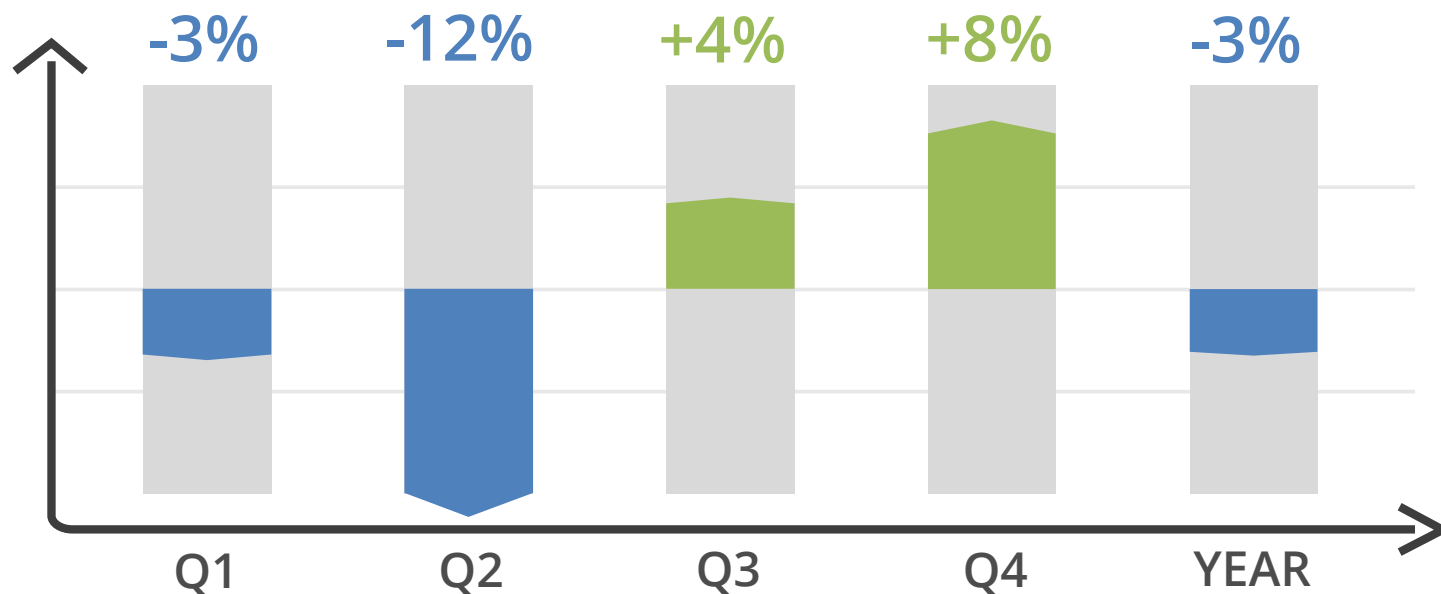


Re-opening week of 6 or 13 July

In the unlikely event that schools only open a few weeks before the usual end of the summer term then the few schools that indicated this scenario suggested Q2 spending would shrink much more deeply leading to an annual loss.

2020

Calendar year

6/13
July

2020



COVID-19
Impact
Third report

End