

2020

COVID-19 update

6<sup>th</sup> report covering  
feedback from SBMs in  
English maintained schools



## | An analysis of resource spending

Primary and secondary maintained schools in England  
NERP#644.6: 2020

 [researching.education](https://researching.education)

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COVID-19  
Impact  
Sixth report




ENGLAND



This market update primarily looks at historical information to highlight the changes in spending on ICT and non-ICT (traditional) resources.

The research was conducted between 20 July and 31 July and covers the period when schools have begun the process preparing to fully re-open in September.



respondents

317 primary SBMs

204 secondary SBMs

Intro



## Introduction

Spending on resources in schools is not well documented outside of crude historical analysis of school outturn figures. Therefore, C3 Education has undertaken an analysis on a range of spending categories with school business managers. In this analysis we investigate the broad changes in ICT vs traditional resources since 2011/12. New data has now been gathered to update findings and provide an estimate for 2020/21.

The analysis covers maintained primary and secondary schools (authority and academies) in England. Digital content and blended learning resources (comprising both digital and printed resources are excluded).

Spending is recorded direct from school budgets and does not include resources delivered from centralised LA or MAT budgets that is not part of the standard individual school allocation.



## Definitions

Traditional teaching aids and equipment covers the following categories:

- Teaching aids and consumables
- Textbooks
- Other books and printed resources
- Art and craft materials
- Design & technology equipment
- Play and sports equipment
- Laboratory/technical equipment

ICT spending in this analysis covers the following categories:

- Devices (non-admin)
- Networking and peripherals
- System software solutions
- Other computing hardware (inc. admin devices)

Note: Digital content spending is excluded from both headings as it is often difficult to split spending over these two categories.



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## Thoughts

In recent years, most assessments have been that ICT resource growth has outpaced that of traditional teaching aids and equipment. The findings from school business managers in this report corroborates this outlook. While traditional teaching aids and equipment spending hardly moved between 2011/12 and 2018/19, ICT hardware and software spend averaged positive growth of more than +4% per annum (allowing for the peaks and troughs over this period. Growth in the secondary sector followed the same trend - even if it appears to be a little more muted in this analysis.

What we are likely to see this year and next is an extension of this disparity in spending direction. Both primary and secondary sector school business managers are indicating a deep reduction in spending on traditional teaching aids and equipment of around -4% per annum between 2018/19 and 2020/21. In contrast, the recent school disruption from COVID-19 and the focus on remote teaching and learning is likely to see ICT hardware and software spending expand by +7% per annum.

 Exec



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## Thoughts

Whether we'll see a re-balancing once all schools move into the, hopefully post-pandemic, period of 2021/22 is difficult to ascertain. However, what is clear is that schools will be spending appreciably more on technology than they did at the turn of the last decade - even allowing for inflation.

Responses from 600+ school business managers offer some interesting insights, but do note that this is a much smaller sample than we normally use for assessing market size and should be considered interim. Full data will be available in the annual BESA 'Resources in Schools' report, which will be published in January 2021.

 Exec

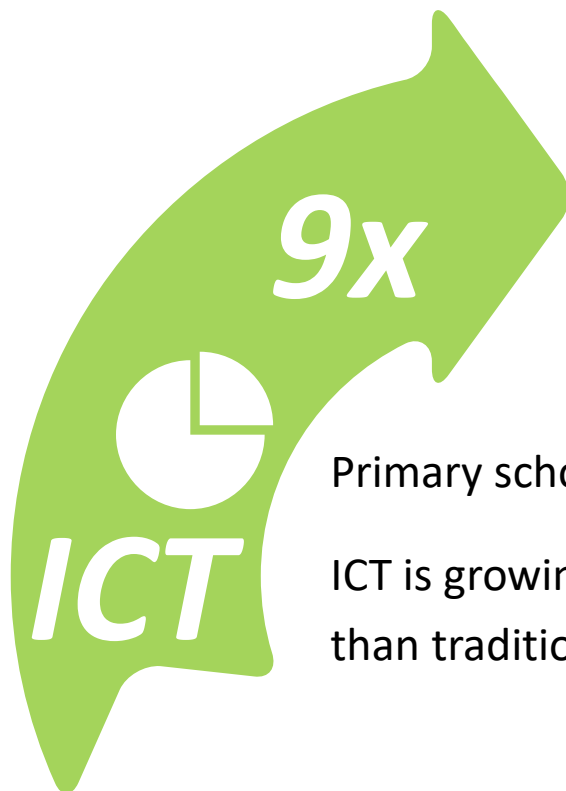


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## Spending changes across the primary sector

Intro



Primary school spending on ICT is growing **9x** faster than traditional resources



Increase in ICT spending over 7 years compared to only **4%** for traditional teaching and learning resources



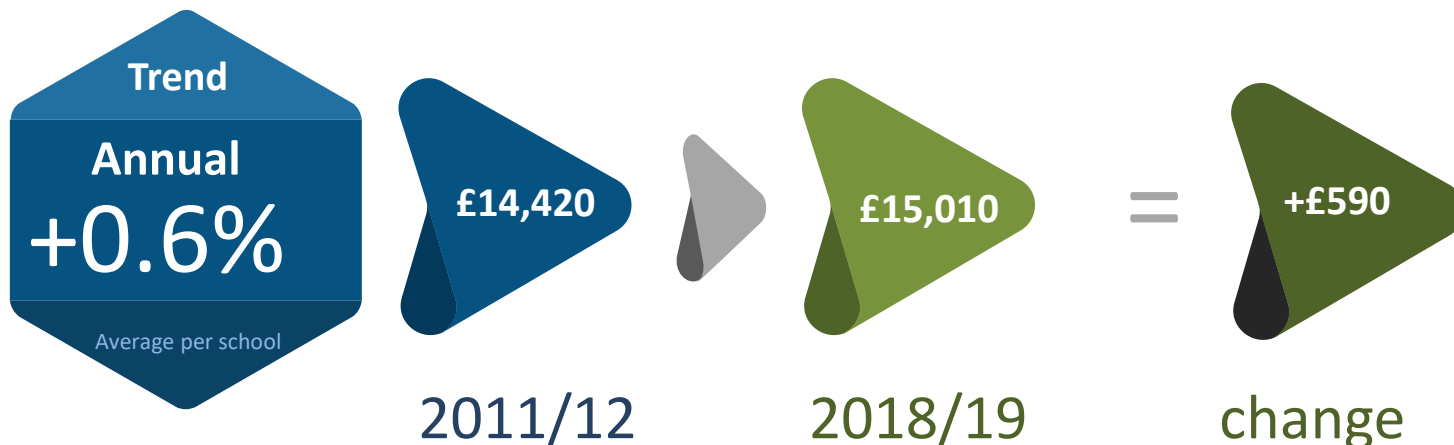
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## Spending changes across the primary sector

### TRADITIONAL TEACHING AIDS & EQUIPMENT

7 YEAR PERIOD



### ICT HARDWARE & SOFTWARE



Pri



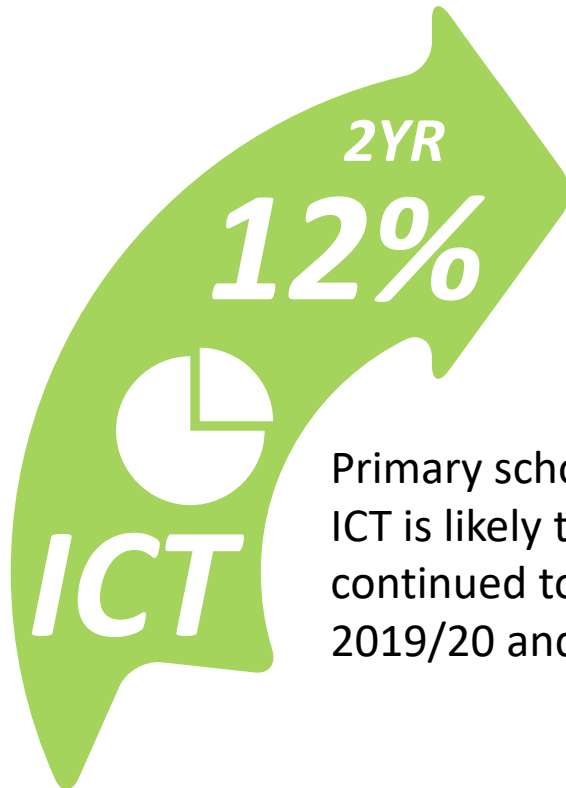


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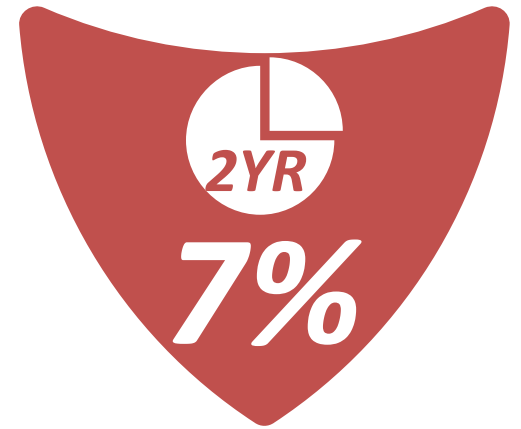


## Forecast changes across the primary sector

Intro



Primary school spending on ICT is likely to have continued to grow through 2019/20 and into 2020/21



In contrast the project is for spending on traditional resources to contract by 7% over two years



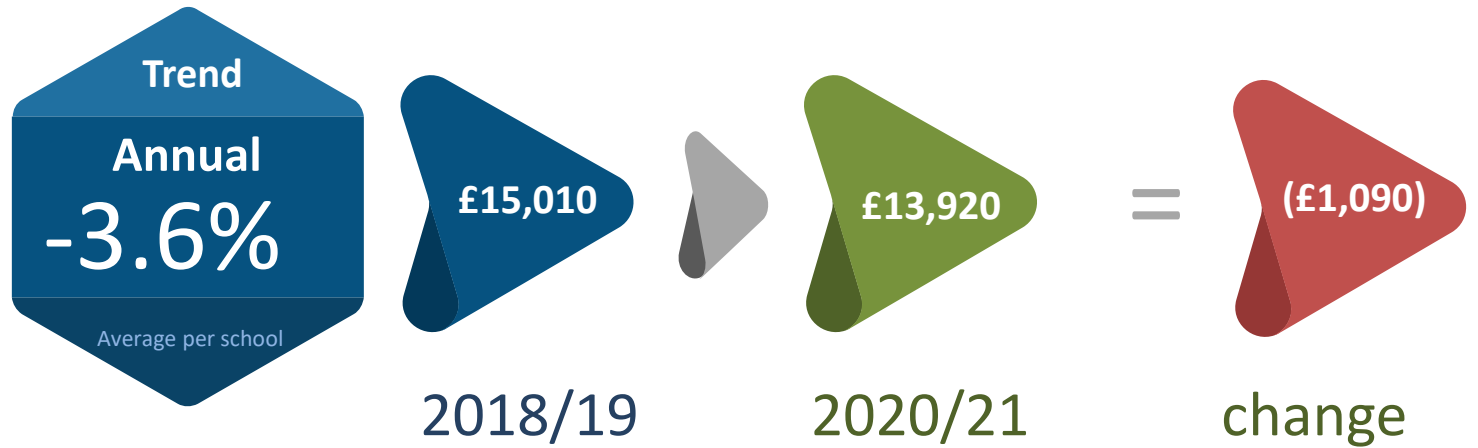
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## Forecast changes across the primary sector

### TRADITIONAL TEACHING AIDS & EQUIPMENT

2 YEAR PERIOD



### ICT HARDWARE & SOFTWARE



Pri

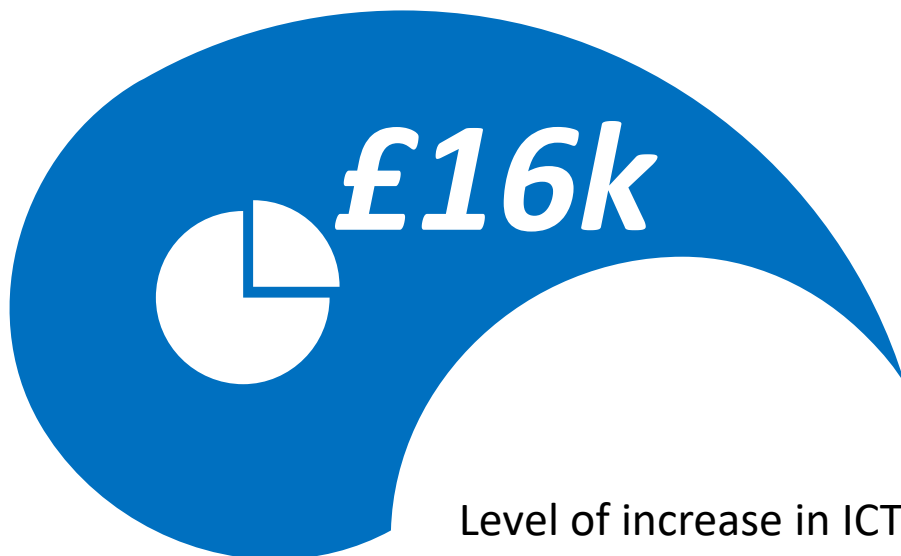


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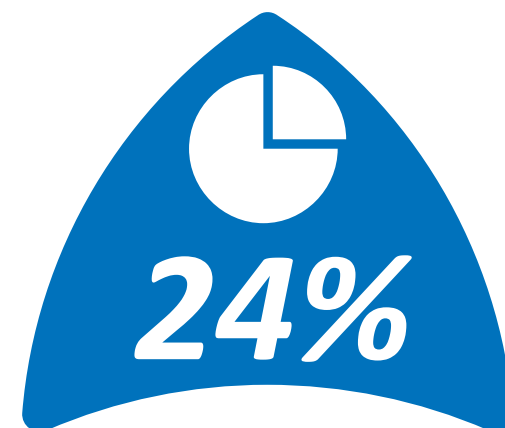


## Spending changes across the secondary sector

Intro



Level of increase in ICT spending by secondary schools over the last 7 years



Increase in ICT spending over 7 years compared to contraction of -2% for traditional teaching and learning resources



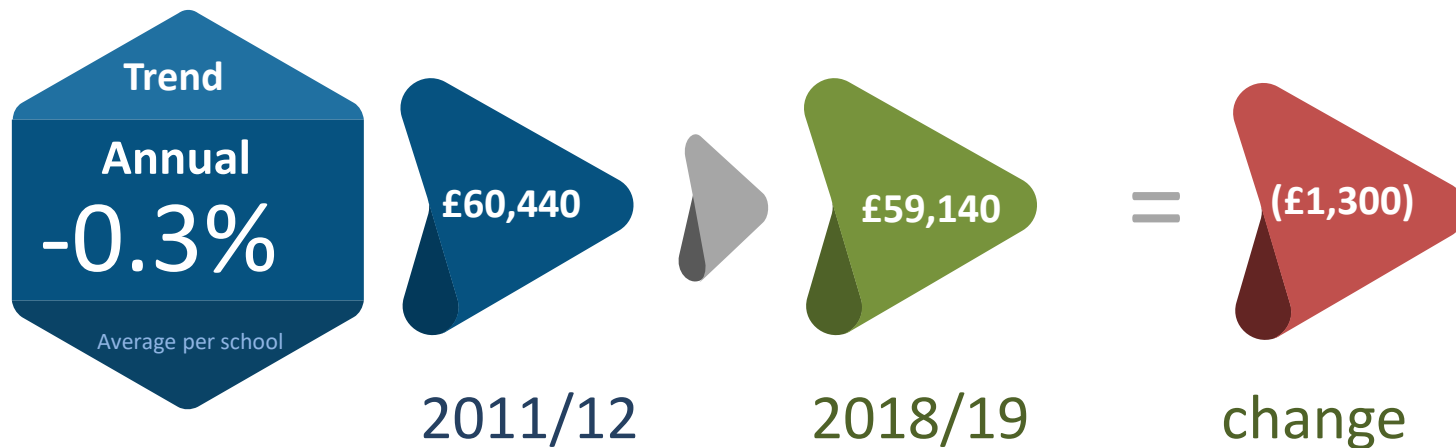
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## Spending changes across the secondary sector

### TRADITIONAL TEACHING AIDS & EQUIPMENT

7 YEAR PERIOD



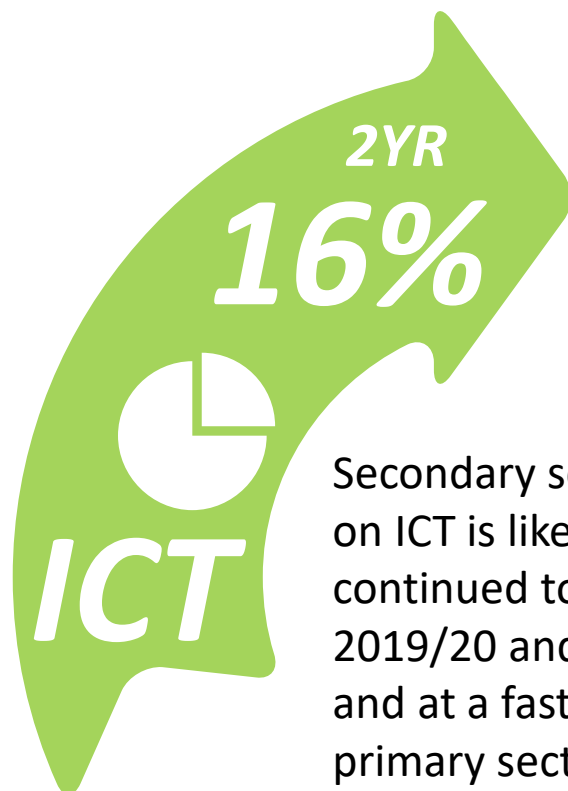
### ICT HARDWARE & SOFTWARE



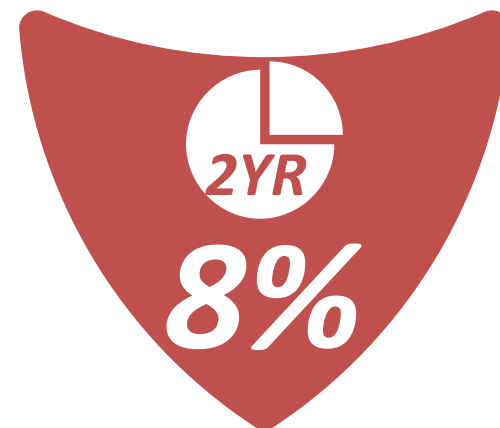
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## Forecast changes across the secondary sector



Secondary school spending on ICT is likely to have continued to grow through 2019/20 and into 2020/21 and at a faster rate to the primary sector



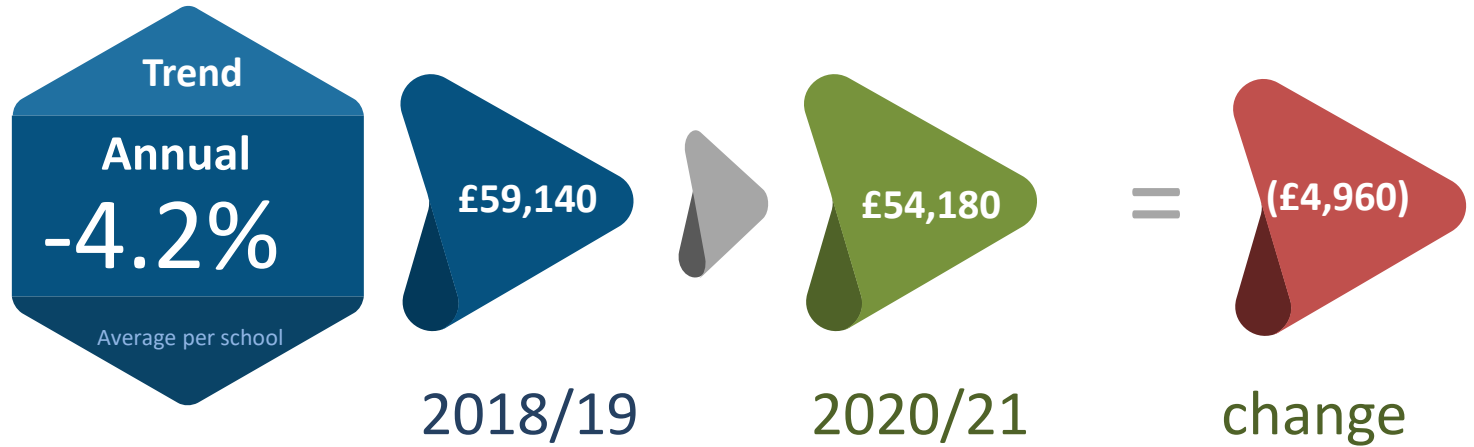
In contrast the project is for spending on traditional resources to contract by 8% over two years



## Forecast changes across the secondary sector

### TRADITIONAL TEACHING AIDS & EQUIPMENT

2 YEAR PERIOD



### ICT HARDWARE & SOFTWARE



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