Evaluation of CMF funded UK online centres - final report

Jeremy Wyatt, Sabrina Allison, Denis Donoghue, Patricia Horton, Kieran Kearney

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The views expressed in this report are the author’s and do not necessarily reflect those of the Department for Education and Skills.

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Executive summary

By April 2003 UK online centres had helped around 319,000 adults in the ‘digitally excluded’ target group to use Information and Communication Technology. A high proportion of them went on to learning, and some to jobs or better jobs. Users also found the centres helped them to develop greater confidence, better community connections and improve their skills for employment. UK online centres may have contributed to the recent significant increase in the level of interest in the Internet in the 2,000 most deprived target wards.

Set against this, most centres had not attracted the most excluded groups – a typical UK online centre user was already interested in ICT to some extent. Other research confirms that there has been little change in Internet access for those on the lowest incomes.

Background

This is a summary of the key findings of the final evaluation of the Capital Modernisation Fund (CMF) funded UK online centres. DFES commissioned the research when the programme was announced and before any projects had been funded. The evaluation spanned three years from 2000 to 2003.

The main objective of this study was to evaluate the impact and efficiency of the rollout of the programme as a whole, with four more specific objectives:

- to identify whether participants have increased their ICT skills;
- to quantify the extent to which participants are achieving positive short-term and longer-term outcomes as a result of improving their ICT skills and having access to ICT;
- to explore the issue of deadweight and assess the magnitude of deadweight loss; and
- to record the broader impact of the Centres on individuals and the wider community.

Method

The evaluation used a large-scale user survey, manager surveys and case studies. Most data relates to users who started at centres before July 2002. We collected quantitative data through:

- A web-based centre manager survey in April 2002 - sent to 420 centres with a 63% response rate.
- A web-based centre manager survey in April 2003 - sent to 2,699 centres with a 24% response rate.
- An initial user survey questionnaire - completed by 7,563 users at 283 centres, with centre staff support where needed. This was reasonably representative of new users.
- A follow up user survey six to nine months later - posted directly to initial user survey respondents and returned by 1,861 people. This was a little biased towards women and older users.
A second follow up survey for users in the first round, to gather longer-term output data, with 394 responses. This was further biased towards women and older users.

We collected qualitative data through 10 case studies and visits to 90 centres. We have drawn on this extensive experience of centres to explore and explain findings from the surveys.

Using this data we have analysed outputs for users starting at centres before July 2002. But most users started after this date, so we have provided indicative estimates for activities and outputs to March 2003.

The centres acted broadly as intended

Most centres have attracted the target groups

The majority of UK online centre users were from the programme’s six socially excluded target groups. Most also lacked confidence to use computers when they started, although many had computers at home that they did not know how to use. The centres attracted people new to learning and those who had thought ICT was not relevant to them.

Between 62% and 64% of the users were from the six socially excluded target groups named in the programme prospectus, particularly unemployed people, those needing help with literacy and numeracy, and over 60’s new to learning.

The centres were particularly successful in attracting unemployed people with over 20% of all users in this category.

38% of people attracted to the centres had not taken part in learning in at least five years. This was true for 41% of those over 60 years old.

74% of centre users were “digitally excluded” – 59% did not have the confidence to use computers, 46% did not have access to the Internet at home or work, and 31% lacked both.

But only 6% of users were from the most excluded groups\(^1\) and around 60% already had a PC at home.

We did not identify significant levels of ‘deadweight’ – that is activity that would have happened in any case. The figures above imply that there was ‘leakage’ – that is providing a service to people who were not in the target groups. Some users (9%) were aged under 16 and around a quarter (26%) claimed to have Internet access and the confidence to use it. Allowing for the overlap between these two groups, we classed just under one third (32%) of users as ‘leakage’.

Users were very satisfied and achieved more than they expected

Centre users liked their experiences at the centres. They recommended the centres to others, and they felt they got what they came to the centres for. Most did what they expected, and many achieved more than they expected.

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\(^1\) i.e. those people who fell into three or more of the six target groups
95% of new centre users said they would recommend the centre to other people; six months on 86% said they had indeed recommended it to other people.

After a year, 96% said that they were satisfied or very satisfied that they got what they came to the centre for – 50% were very satisfied.

Centres helped people use the Internet

Most centres offered drop-in access to the Internet for uses other than learning. The majority of users learned how to use the Internet at the centre and some were shown community and e-government websites. Six months on, most people who had never used the Internet before used it at least once a week.

56% of users learned about using the Internet while at the centre.

63% of users were using the Internet at least once a week six months after starting at their centre.

At the centres, only 26% users spent most of their time online, while 60% took part mostly in PC only activities. But the levels of Internet use rose over the life of the programme.

Six months on, 24% of centre users without home Internet connection when they first came to the centre subsequently had become connected. And 41% of these said it was because of coming to the centre.

Users learned new ICT skills and gained confidence with ICT

Most respondents to the initial user survey said that they learned new skills they would not have gained otherwise. Six months on, users’ experience with various ICT activities had improved markedly.

84% of new users agreed they were learning skills they would not have gained otherwise.

64% of users who had never sent an e-mail when they first came to the centre had done so six months on; 63% had looked for information on the Internet for the first time.

Many users progressed, particularly to further learning

Many users progressed to further learning

Half of all users who stayed at centres for six months or more went on to do learning that earned them a certificate (whether externally verified or not). A high proportion said that the centres had helped them to progress to learndirect courses and to college. The longer users stayed at a centre the more likely they were to progress. And staff advice and encouragement resulted in more people progressing to further learning.

Six months after coming to the centre, 50% of users had completed a course at the centre and received a certificate. 40% of these had completed an intermediate or advanced course.

Figures were similar even for people who had not participated in learning in at least five years.
91% of qualifications users gained were ICT related, 9% were non-ICT or used ICT for wider skills.

11% of users said that the centre had helped them at least ‘a fair amount’ progress to college and 26% to learndirect courses.

Modest changes in employability

Most users, apart from retirees, thought that coming to the centres helped to improve their skills for work to some degree.

- After six months, 8% of users thought coming to the centre had helped them get a job, 7% thought it had helped them to get a better job.
- A third of users felt that coming to the centre had significantly helped them improve their skills for work.

Users experience broader outcomes

Improving confidence is a key benefit

Almost all users said that their confidence had improved to some extent since coming to the centre. This increased over time. Meeting new people was a major benefit for nearly half of all users.

- The clearest personal benefit for centre users was an increase in general confidence. 79% of respondents to the initial user survey said coming to the centre had increased their confidence – 38% said “a lot”. A few months later 30% said their confidence had improved “a lot”.
- This was particularly the case for people from socially excluded groups: a third said it had improved their confidence “a lot”.
- 48% of users said that meeting new people was the best thing about coming to the centres.

Some broader community benefits

UK online centres are often located in community centres with other activities, and were a source of new social connections for most users. After six months one fifth (20%) of users had been helped “a lot” or “a fair amount” to be more involved in their community. Almost two thirds (63%) of users with children under 18 living with them said coming to the centre had helped them to help their children with homework.

The programme has also led to wider community benefits in an indirect way. Many community-based centres have found that the UK online centre part of their operation has had knock-on effects on other aspects of their service. Similarly many colleges were able to develop community based provision and new approaches to learning through their UK online centres.

Some progress with use of e-government

Although few new users had used the Internet before coming to the centre, six months later over half used it at least occasionally.
Six months after coming to the centre 75% of users shown e-government services had used them, while 31% not shown them had used these services.

A year after first coming to the centre, 53% of users said that, since coming to the centre, they had accessed government and council services online.

**Overall programme impact**

**There may be a wider impact on interest in the Internet**

According to ONS data, between October 2001 and October 2002 there was a decline across the UK in those not interested in using the Internet. This decline was much sharper in the most deprived 2,100 wards (where UK online centres are sited). This brought the proportion of non-users who are not interested in line with that in less deprived neighbourhoods at 39%. It seems reasonable to suggest that this may have been due, at least in part, to the UK online centres.

**Little change for the lowest income groups**

Oftel data shows that the gap in home Internet access is narrowing between households in areas of higher deprivation and those in less deprived areas. As with the change in interest levels, some of this may be due to the impact of UK online centres. But increases in take-up of home Internet have been entirely among the C1 and AB groups. The rate of connection among the DE groupings has remained around the 20% level since 2001. So in general it seems to be the better off people within deprived areas who are improving their Internet access. This correlates with our evidence that many UK online centres are not reaching many people in the most excluded groups.

**Programme outputs**

In calculating the programme outputs, we have assumed that centres continued to perform as they did between October 2001 and June 2002. This is by no means certain. But on this basis we estimate that the overall outputs to March 2003, among the target adults who lacked either computer skills or access, would be:

- Around 130,000 target adults had the opportunity to use the Internet for the first time at a UK online centre and around 99,000 sent their first e-mail while attending a UK online centre.
- Around 128,000 target users significantly increased their confidence.
- Around 127,000 target adults were helped by centres to re-engage in learning.
- Around 272,000 target adults have learned new skills they said they would not have learned otherwise.
- At least 67,000 adults have progressed to further learning at UK online centres.
- 93,000 target users may have achieved some form of qualification.
- 25,500 users feel that UK online centres helped them progress secure a job to some extent.
Community and Voluntary sector-led centres

Results of additional revenue funding

Following early concerns that Community and Voluntary sector centres were experiencing difficulties due to revenue funding shortfalls, the DfES provided special funding for 201 vulnerable centres – usually £25,000. We tracked a sample of the centres that received the money, along with a control group, and found that the funding resulted in a more effective service. In particular, our interviews with centre managers suggested that:

- there were more users;
- more users came from hard-to-reach groups;
- there was more support for all users;
- there were extended opening hours; and
- the most vulnerable projects were able to open rather than failing to do so.

Community and Voluntary sector centres reach the target groups better

Community and Voluntary sector centres attracted higher proportions of socially excluded and digital excluded users. They also used a much greater number of volunteers – often people who had first been users. They appear to play an important role in engaging the more excluded groups.

- In our initial user survey, 69% of new users at Community and Voluntary sector centres fell within one of the target groups. This compared with 61% for local authority centres and 57% for FE and HE centres.
- 49% of users at Community and Voluntary sector centres already had functional Internet access, compared with 55% at local authority run centres and 57% at FE run centres.
- The average excluded user of community-based UK online centre fell into 1.50 of the 6 target groups. This compared with 1.39 at local authority centres and 1.42 at college-run centres.
- Community and Voluntary sector centres attracted 3 times as many volunteers as local authority or college-run centres (4.5 on average, against 1.6 volunteers at the other centres).

The annual total needed to support these centres would be between £10M and £34M.

The future of UK online centres

A role for public access Internet services

We infer from our quantitative evidence and other recent research, combined with our discussions with users, that public Internet access will not provide a way for most people to have functional access to the Internet. This may change – the whole market for Internet services is still relatively new and is subject to fast developments. Nevertheless, current evidence suggests that only those with home, work or college Internet access have truly crossed the ‘digital divide’.
So we recommend that the focus for UK online centres should be on the areas where the programme has succeeded so far – encouraging interest and developing skills.

The role of the Community and Voluntary sector

Community and Voluntary sector centres are more successful at reaching digitally and socially excluded target groups, but their funding is vulnerable. These projects, and their particular variety of flexible and supportive learning, cost a little more and need targeted support - both with advice and revenue funding.

If the UK online centre initiative continues to prioritise engaging new ICT users and learners, we recommend that maintaining the Community and Voluntary sector should be recognised as a key policy goal. Sector specific support mechanisms should be put in place or extended.

Sustainability and charging for services

As the pump-priming and short-term funding sources that set up the UK online centres expire, so the new funding sources will determine what centres do. But no other existing funding sources are well suited to preserve the unique focus of UK online centres. Centre managers repeatedly identified the pressure to move away from hard to reach groups towards ‘easier’ target groups to ensure they achieved outputs. Charging for services and pursuing other heavily committed funds will not provide a solution - a funding gap is likely.

So we recommend that whatever the future funding regime, additional funding is targeted on the successful informal services that many UK online centres have developed to attract excluded groups and those not involved in learning. For reasons identified earlier this should be targeted on the Community and Voluntary sector and on partnerships between this sector and others. We also recommend that the continued success of UK online centres in reaching the more excluded groups and helping them to progress is carefully monitored to ensure the additional funding is well spent.

Progressing to learning

Although we have not been able to follow users’ long-term progress, our evidence does suggest that UK online centres are good at attracting new learners and helping them to progress.

We recommend building further links between UK online centres and both colleges and learndirect to help build on the success to date.

Maintaining the wider benefits of UK online centres

Many UK online centres focus on helping people to make social contact, improve communication in families, help with homework and so on. These were important to the users and managers we met. They seem to be important in the wider impact of centres on engaging new learners and developing confidence.

We recommend that any decisions on the future of UK online centres take into account these less tangible and broader factors.
CMF Funded UK online centres evaluation

This evaluation examines the success of the Capital Modernisation Fund (CMF) funded UK online centres. Over 3,000 such centres have been set up in England’s 2,000 most deprived wards.

1.1 ICT Learning Centres

In 1999 the Government earmarked £252M of Capital Modernisation Fund (CMF) money to set up "ICT Learning Centres" in the most deprived 2,000 wards of England. The prospectus\(^2\) for these funded centres stated that:

"The purpose of establishing ICT Learning Centres is to bridge the gap between those in society who have access to ICT and are able to use it competently and confidently and those who do not."

This initiative focuses on adults in disadvantaged communities. In particular, the following are the indicative client groups for the Centres:

- people who need help with basic skills
- lone parents
- people from minority ethnic groups
- unemployed people
- people with disabilities
- people who are over 60 and not involved in learning activities."

The prospectus set out three possible roles for the ICT Learning Centres in helping people to:

- Use the Internet to find out about, for example, local events, family history, travel and health;
- Send e-mail and use other ICT applications such as games, mobile phones and digital television; and
- To explore the opportunities information technology can offer, such as further learning and updating skills.

The emphasis of the programme was on providing local solutions for local people.

\(^2\) DfES, 2000, Help your community get ahead, part of the ICT Learning Centres Prospectus pack
1.2 UK online centres

The Government re-branded ICT Learning Centres as UK online centres, along with centres in libraries (the ‘People’s Network’ centres) and some existing IT learning centres. The Government formally launched the UK online centre brand in summer 2000 as part of its drive to ensure that everyone who wants to can access the Internet by 2005. In November 2002, DfES announced that the target of 6,000 UK online centres had been met. Of these, over a third were in libraries and a fifth were ‘branded centres’ in the Community, Voluntary, Private and Further Education sectors. The balance was CMF funded centres.

1.3 3,000 capital funded UK online centres

DfES as the lead department approved funding applications totalling £199M for 2,840 of these centres. They are based in settings varying from football clubs to pubs, community centres to colleges and buses to hostels for the homeless. In practice 3,052 were open by March 2003 (more than were initially approved).

The New Opportunities Fund (NOF) also granted £69M revenue funding to ICT learning centres in England through its Community Access to Lifelong Learning (CALL) programme. (NOF have commissioned a separate evaluation of the UK wide CALL programme.) DfES and NOF liaised to launch the CMF and CALL programmes together, with a single application form for England. Regional Government Offices (GOs) played a key role in assessing and recommending applications for approval.

Most centres also secured revenue funding from other sources. For most centres the NOF funding represented under half of the overall revenue costs. DfES provided a small amount of revenue funding to 201 projects (see below).

1.4 201 revenue funded projects

An earlier study identified problems with the scale and nature of revenue funding available. There were particular problems among smaller community-based projects, which often deal with harder to reach client groups.

DfES responded with a limited one–off grant fund for smaller projects distributed through GOs, following criteria recommended in the study. GOs awarded revenue grants of £25,000 initially to 42 projects in a first round. GOs recommended a further 159 projects for funding in the second round, with grants ranging from £2,000 to £134,850. Most awards were in the £10,000 to £25,000 range.

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3 The People’s Network is a New Opportunities Fund (NOF) programme, providing public Internet access in every library. NOF is a Lottery Distributor created in 1998 to award grants to education, health and environment projects throughout the UK.

4 Hall Aitken (2001) DfEE CMF UK online Centres Revenue Funding Review
1.5 Evaluation goals

The overall aim of the study was to evaluate the impact and efficiency of the rollout of the programme as a whole, with four more specific objectives:

- to identify whether participants have increased their ICT skills;
- to quantify the extent to which participants are achieving positive short-term and longer-term outcomes as a result of improving their ICT skills and having access to ICT;
- to explore the issue of deadweight and assess the magnitude of deadweight loss; and
- to record the broader impact of the Learning Centres on individuals and the wider community.

This final report addresses each of these objectives and goes some way to assessing the extent to which participants have progressed to further learning – an emergent goal of the programme.

In addition, this report summarises an evaluation of the additional revenue funding, commenting on how projects spent the money, its additionality and the sustainability of Community and Voluntary sector projects.

1.6 Evaluation methodology and interpretation

We based the evaluation on a large-scale user survey, manager surveys and case studies – all outlined below and detailed in the appendices.

1.6.1 Sampling strategy

DfES provided funding to projects, each of which comprised one or more centres. The centres within each project were, sometimes, very different. So we focused the evaluation on centres, rather than projects.

We secured confirmed details of 652 centres, including opening times, users each quarter, sector leading the project, programming mix, type of location, type of service, region and any particular target groups. This information was the main basis for the user survey part of the evaluation.

1.6.2 Manager survey

We ran two main manager surveys:

- A web-based centre manager survey in April 2002 – sent to 420 confirmed centres with 274 responses (a 65% response rate); and
- A web-based centre manager survey in April 2003 – sent to 888 centres using e-mail addresses and to 1,811 centres by post, both using DfES contact data. The combined response rate for this survey was 658 or 24% valid responses.
We have assumed that the level of response to this survey means that it is reasonably representative of all centres, but we have no typology data on all centres to allow us to test this.

1.6.3 Large-scale user survey

A large-scale user survey was the core of the study. It involved two questionnaires:
- an initial user survey, a short closed-question survey form, completed by users at the centre with centre staff support where needed; and
- a follow up survey six to nine months later, posted directly to initial user survey respondents (who had agreed to participate) and with an incentive.

We planned the user survey in three waves to match the three rounds of applications, with repeated surveys at the earlier centres to track any changes in these groups over time.

By the summer of 2002 it was clear the original timescale for centre opening was delayed by at least one year, but the evaluation timescale could not be extended. At this point we therefore accelerated and truncated the survey programme. We also ran a second follow up survey for users in the first round, to gather longer-term output data.

At the point of completing the initial questionnaire, a third of respondents had been at the centre for more than 3 months (34%), but 17% had completed the questionnaire on their first day.

In the rest of the report:
- ‘new users’ means respondents to the initial user survey;
- ‘after six months’ refers to the first follow up survey; and
- ‘after one year’ refers to the more limited second follow up survey.

1.6.4 Large-scale user survey numbers

We secured user survey returns from 283 out of 652 confirmed centres, or a 43% response rate for centres. The 283 centres were broadly representative of the 652 centres on the dimensions of our sampling frame. They were largely first and some second round centres. All our user survey data is from users who first came to centres up to July 2002.

This report is based on:
- 7,563 responses to the initial user survey gathered from October 2001 to November 2002;
- 1,861 responses to the first follow up survey gathered from April 2002 to June 2003; and
- 394 responses to the final follow up survey gathered from April 2003 to June 2003.
1.6.5 Case studies and visits to centres

We completed 10 case studies based on centre manager interviews, reviews of competitor services, user interviews and focus groups, and tracking of developments.

We also visited over 90 centres while arranging the user survey and studying good practice with the target groups. We held short discussions with staff and users (where possible) at each centre during these visits. We have drawn on this extensive experience of centres to explore and explain findings from the surveys.

1.6.6 Revenue projects evaluation method

In evaluating the 201 projects DfES provided with additional revenue funding we carried out:

- Initial telephone interviews with 57 projects that received the additional funding ('funded centres');
- Initial telephone interviews with 23 comparator projects that did not receive additional funding ('non-funded centres');
- 10 case studies with both types;
- Follow-up interviews with 37 funded projects and 12 non-funded projects;
- Centre managers survey; and
- Desk research to provide funding costs for community-based UK online centres.

1.7 Commentary on analysis

Taking all elements of the survey design and operation into consideration we have concluded that our overall user survey results are reasonably robust and representative of the new users coming to the centres up to June 2002. Because:

- our overall user profile is similar to that of the DfES monitoring data;
- the overall number of centres involved was 43% of validated centres open during the main parts of the survey;
- the profile of participating centres was close to the best information we have on the profile of all centres; and
- managers confirmed that the profile of respondents from their centres was close to the profile of all their users and that most new users at those centres completed a questionnaire.

But the number of users has grown substantially (as shown in the next chapter in Figure 2-1) – with around 70% of all users to March 2003 using the centres after we completed our initial user surveys. So we can only comment authoritatively on the results from the centres running during our data-gathering period – amounting to around one fifth of all centres.
To estimate overall impacts to March 2003, we have to assume that the remaining 2,500 later opening centres are similar to earlier centres. Some evidence supports this:

- The proportion of all users in the six target groups from monitoring data to March 2003 is close (at 64%) as in our survey of users starting before July 2002 (62%);
- Analysis of the monitoring data of the later opening centres compared to the earlier centres shows no significant changes in the age profile of users.

But there is also some evidence suggesting changes in the profile of users over time:

- The proportion of men using centres has steadily risen;
- The proportion of unemployed users has dropped while there has been an increase in the proportion of users with disabilities and from minority ethnic groups; and
- According to monitoring data there was a large drop in users progressing to further learning from 37% in the first quarter of 2002 to 21% in the first quarter of 2003.

Data on the sectors sponsoring the centres and the nature of spend is not available for all centres so we cannot check successive rounds of centres for differences on these dimensions. We consider that both these factors could be important in comparing centre performance. Additionally, our survey data and case study visits suggested that centres do change over time – becoming more successful as they mature.

Taking into account this analysis and our extensive experience of visiting projects, we consider that the results of our research are broadly indicative of all users’ experience at centres. Centre monitoring data bears this out.

But specific impacts to March 2003, such as numbers progressing to further learning and into employment, are much less clear. We have provided indicative estimates of these in the final chapter, but they should be regarded with some caution without further evidence. We do not believe that the centre monitoring data on outputs is reliable as it does not involve any follow up surveying, but only records centres staff’s understanding of users’ plans on leaving.
2 Centre users and their background

Almost half a million people had used UK online centres by April 2003. Nearly two thirds of them were in the six disadvantaged target groups suggested in the original prospectus. While most had some prior interest in or contact with ICT, three-quarters lacked the confidence, skills or access to ICT to take advantage of this.

2.1 500,000 users

After a slow start, the number of people using UK online centres has increased steadily, with a steep increase from Spring 2002 onwards. According to monitoring data, during the first quarter of 2003 there were around 280,000 users. This was a more than fivefold increase in quarterly user numbers over the previous year.

Figure 2-1 Estimated total users by quarter

Since the start of the programme we estimate that about half a million people have made use of the CMF funded centres (between 431,000 and 512,000). Almost 9% of these were under 16 years old and therefore not in the target groups for the programme.
Although the proportion of users in the key target groups decreased (from 75\% to 64\%), the overall number of target users increased by nearly five times over the previous year to 180,000 in March 2003.

Some 55\% of all new users were female and 45\% male, and the gap has narrowed over time. While centres vary, a significant number are more suited to women. For example, being open ‘nine-to-five’, providing childcare and providing programmed courses – all of which appeal more to women than men.

**Figure 2-2 Age and gender profile of users**

![Age and gender profile of users](image)

**DFES Monitoring returns, October 2001 to March 2003**

### 2.2 Reaching the socially excluded target groups

Monitoring data from centres suggests that, between October 2001 and March 2003, 64\% of UK online centre users were in at least one of the six target groups. This figure is similar to the 62\% figure from our user survey. The monitoring data shows some changes over time in the profile of users as shown in Figure 2-3. The proportion of ethnic minority users increased steadily from 15\% to over 20\%. The proportion of unemployed users fluctuated but showed a decline since early 2002. There was a steady rise in the proportion of disabled users, perhaps reflecting successful targeting and centres introducing specific measures to enable access.

**Figure 2-3 Changes in target groups over time**

![Changes in target groups over time](image)

**Sources: DFES monitoring data (October 2001 to March 2003)**
There were also significant regional variations. During the first quarter of 2003, three-quarters of centre users in the South-East were in at least one of the target groups, compared to just over half in the East of England (54%).

Figure 2-4 compares the proportion of adults in each target group in the overall England population with those using the UK online centres between October 2001 and March 2003. It shows that UK online centres attracted higher proportions in all groups apart from the elderly. They were particularly successful in attracting unemployed people and ethnic minorities. But they were less successful in attracting lone parents, with the proportion using the centres only one percentage point higher than in the population as a whole.

Around one quarter of all users fell into more than one of the target groups and 7% into three or more. It seems reasonable to assume that these users were among the most excluded groups in the target areas.

**Figure 2-4 Proportion of users in different target groups**

![Proportion of users in different target groups](image)

The types of users varied by region. Few regions were successful in attracting all the target groups. For example, London succeeded in targeting unemployed and minority ethnic users but had lower proportions of elderly and disabled users than in the overall London population.

We compared the user profile from our user survey with centre monitoring data for the period between October 2001 and June 2002. This is shown below in Figure 2-5. The centre monitoring information identified a higher proportion of ethnic minority users, while the self-completed survey covered more lone parents, people with disabilities and with basic skills barriers.
2.3 Reaching digitally excluded users

Around three-quarters of all users lacked *either* access to the Internet at home, work and college *or* the confidence to use computers or *both* (74%). Figure 2-6 shows the proportions of new users with access and confidence barriers – with the proportions for the target groups highlighted.

More socially excluded users were less confident in using a PC than other groups (only 38% were confident compared with 45%). They were also much less likely to have home Internet access (45% compared with 68%).

Sources: DfES monitoring data (October 2001 to June 2002); Hall Aitken Initial User Survey, Respondents in a socially excluded target group, n= 7563
* Monitoring data for lone parents and people with literacy/numeracy problems relates to only April-June 2002
Centres have become more successful at attracting users with limited Internet access and confidence over time. Figure 2-7 shows that, in Autumn 2001, 24% of new centre users had neither Internet access nor the skills and confidence to use a computer. One year later this had increased to 39% of new centre users.

**Figure 2-7 Change in level of digital exclusion of users over time**  
Source: Initial User Survey, All answered, Round 1, n=856, Round 2, n=3328, Round 3, n=1578

DfES monitoring data on target groups suggests that centres improve on this success over time too.

Figure 2-8 shows that in the first quarter 2003, Phase 1 funded centres had 68% of their users in the target groups, while those that opened in Phase 3 had only 63% within target groups.

**Figure 2-8 Proportion of users in target groups by funding round**

As centres have become more established, two factors have contributed to this increased success.

- The tendency for early users of any service to be those most interested, skilled and confident already, with others following later; and
The increased profile of the centres through formal local marketing and through word of mouth.

The rising profile of the Internet across all forms of media may have played a part too. UK online PR campaigns have had a small impact – 1.5% of new users had heard of the centre through TV advertising.

### 2.3.1 ICT skills and confidence

Fewer than a quarter of new users (24%) had sent an e-mail more than 20 times before attending the centre and fewer than one in five (19%) had used the Internet to research for hobbies and interests. Even for the ICT skill new users had the most experience of—typing and printing a letter—less than one third of users (31%) had done this more than 20 times.

In total 38% of new users had never used the Internet for any purpose. And less than one quarter of all users (23%) had used the Internet more than 20 times for any purpose. This is less than the numbers saying they are confident using a computer shown in Figure 2-6 (41%).

These figures confirm that the proportion of confident users shown in Figure 2-6 is the upper limit of users who already had computer skills before coming to a centre. We have used this higher figure in order to ensure that we have not overstated results in later output and impact calculations.

Figure 2-9 clearly shows that new users’ experience of more advanced Internet activities was limited. Our project visits confirmed this. Many centres provided casual drop-in facilities for users who were skilled in using ICT, but these were not core users.

**Figure 2-9 New users’ ICT Skills**

Source: Initial User Survey, n=7563 (responses not shown for those who had experienced these activities 1-5 or 6-20 times and non responses)
2.3.2 Home ICT access

Figure 2-10 Computer and Internet access at home: users vs UK population

<table>
<thead>
<tr>
<th></th>
<th>October-December 01</th>
<th>April-June 02</th>
<th>July-September 02</th>
<th>October-December 01</th>
<th>April-June 02</th>
<th>July-September 02</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>UK population</strong></td>
<td>49%</td>
<td>56%</td>
<td>55%</td>
<td>39%</td>
<td>45%</td>
<td>46%</td>
</tr>
<tr>
<td><strong>User survey respondents</strong></td>
<td>61%</td>
<td>60%</td>
<td>58%</td>
<td>37%</td>
<td>37%</td>
<td>35%</td>
</tr>
</tbody>
</table>


Early in the programme, a very high proportion of new users had a computer at home – 12 percentage points higher than in the UK population. A year later this had fallen to be nearly in line with the UK population.

The level of home Internet access among early users was only slightly lower than for the UK population. But it remained stable while home Internet access in the UK population has increased.

So over time centres have become more successful at attracting those without existing home Internet access. On the other hand, around six out of every ten users have a computer at home. So the majority of users have some home contact with computers – even if they have made no use of it themselves. This again highlights that the skills and confidence aspects of the programme are critical.

2.3.3 Total users in the target group

Taking the target group for the programme as being all those over 16 without either or both of the access to the Internet and/or the confidence to use it, we calculate the total number of target users as around 319,000 (between 292,000 and 347,000) up to March 2003.

2.4 Reaching new learners and local people

Initially the main policy objective of UK online was to increase computer and Internet access and skills. Over time, DfES has placed increasing emphasis on helping people return to learning. The programme has been successful in this – 38% of users claim not to have attended any training or education course in the 5 years before coming to the centre. This perception matches with centre managers’ assessment of the proportion of their users new to learning.

Most centre users live near the centre they attended, so the centres were successful in serving the target communities. High street centres attracted people from a wider area, but overall:

- 40% travelled less than one mile;
- 23% travelled one to two miles; and
- 35% travelled over two miles.
2.5 Overall user profile

Drawing together the various measures of user profile:

- More than six out of ten users (62%) came from the six socially excluded groups targeted by the initiative;
- At least three out of four users (74%) lacked the confidence and/or access to the Internet;
- The majority of new users (around 60%) had some prior contact with computers and the Internet – either because they had an Internet connection at home which they could not use, or because they already had a computer at home; and
- Nearly four out of ten users (38%) said they were new to learning, at least in the last five years.

Centres have been successful in attracting those who had already developed, or had a reason to develop, an interest in ICT but who had not been able to pursue this. They have also attracted substantial numbers of people who have not engaged in any learning for some time.

2.6 Sectoral variation

Figure 2-11 shows that centres run by different sectors had differing levels of success in attracting the target groups. Our project visits confirmed that community based centres attracted more of the socially excluded target groups than other types of centre. While many Local Authority and FE centres were based in community settings, almost all Voluntary and Community sector centres were.

<table>
<thead>
<tr>
<th>Sector</th>
<th>% in target groups</th>
<th>% new to learning</th>
<th>% without Internet*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Community</td>
<td>69%</td>
<td>32%</td>
<td>51%</td>
</tr>
<tr>
<td>Local Authority</td>
<td>61%</td>
<td>36%</td>
<td>45%</td>
</tr>
<tr>
<td>FE</td>
<td>57%</td>
<td>29%</td>
<td>43%</td>
</tr>
</tbody>
</table>

Source: Initial User Survey, Community, n=1934, Local Authority, n=1219, FE, n=3103  
* at home, work or college
3 Centre activities

UK online centres provide a wide range of activities for their users. General computer use, rather than Internet use, is the main activity. This seems to meet users’ demands, as satisfaction levels are very high.

3.1 Users want to learn how to use a computer

As Figure 3-1 shows, the key reason people came to centres was to learn how to use computers, cited by nearly three-quarters of users as a reason for attending (73%). Only 28% wanted to send e-mails and 20% to get free Internet access. Users often said they wanted to learn how to use computers so they could “speak the same language” as friends and family who already use ICT. Parents of young children wanted to learn to use a computer so they could teach their children how to use it and help them with homework. People in low paid jobs wanted to improve their skills so they could progress.
3.2 Getting people online

3.2.1 Internet access at the centres

Centre manager surveys showed that most centres (50-60%) had Internet access available most of the time (81-100% computer time) for online courses and for informal access for e-mail and web-surfing.

Internet access was free in eight out of ten (78%) centres. And a further 8% charged, but made exceptions for those from disadvantaged groups, while 7% charged all users to some extent.

3.2.2 Internet use at the centres

Figure 3-2 shows that most users spent most of the time at the centre using the computers but not the Internet. There has been a gradual increase in Internet use at the centres as our study has progressed but it seems not to be the main focus at the centres, except for users under 25.

Figure 3-2 Users’ main activity at the centre, over time

There are several reasons for this:

- Most users are initially interested in computers rather than the Internet (see section 3.1 above);
- Many centres use programmed courses as their main provision – until late in the study period these often did not include Internet use (CLAIT being the most prevalent example); and
- Centre staff have encouraged a traditional step-by-step approach so basic computer skills come before Internet use.

3.2.3 Training and encouragement to use the Internet

The proportion of people learning about the Internet has increased over time. 52% of new users in Autumn 2001 learned about the Internet. This compares
with 53% of new users in Spring to Summer 2002 and 67% of new users in Autumn 2002. Of those using the Internet:

- 35% were shown websites on learning activities;
- 18% were shown websites on community activities;
- 21% were shown sites about buying over the Internet; and
- 15% were shown sites about accessing government services on the Internet.

Earlier in the evaluation process UK online centres did not appear to be encouraging users to use the Internet as much as the name might suggest. Over time this has changed and this trend seems set to continue. But surveys and our project visits show that formal and informal learning drives Internet use at centres, rather than online services and e-government.

3.3 Overall satisfaction

From the start of the UK online centre initiative users have consistently showed strong levels of satisfaction with the service they have received. For example:

- 95% of new users agreed or strongly agreed that they would recommend the centre to others – six months later 86% said they had indeed recommended the centre; and
- one year later 96% of users said that they were satisfied or very satisfied that they got what they were looking for.

This success appears to have been mainly a result of the location, general atmosphere, learning support and style of the centres. Users continually commented on this during interviews and focus groups.

"My mother thought even she might understand Janet’s teaching style.”

(woman 25-34)

"There is a great atmosphere here, the staff are very friendly and helpful and there is a sense of community and everyone getting on with each other.”

(man 55-64)

The most common comment was some variant on,

"It’s great because it’s not like a college.”

(many users of all ages)

3.4 A wide range of activities

Most people came to the centres to learn to use computers, and achieved this goal. As Figure 3.3 shows, many more people sent e-mail and got free Internet access than expected to do so. Users also highlighted significant (and unexpected) social outcomes such as meeting new people. Most users experienced a wide range of benefits and often commented on how the centres had introduced them to new experiences they knew nothing about previously.
Our centre visits confirmed these results. Users often had only a general idea that computers would be useful to them, or they were attracted to one activity. A key part of their learning experience was discovering what ICT could provide. One result of this is the extent to which centre staff influenced users’ experience. So if centre staff had not introduced users to particular uses of ICT, they may not have discovered these uses themselves.
Progress to learning and employment

Most users learned new ICT skills. Many took part in learning for the first time in several years and many have gone on to further learning. Evidence of progress with jobs is less clear but a sizeable minority of users thought the centre had helped them develop their work skills.

4.1 Improving ICT skills

Before coming to UK online centres, well over a third (38%) of new users had never used the Internet. After 6 months this had dropped to 11% so over a quarter (27%) of users have now accessed the Internet that had no previous Internet experience whatsoever. The change for different activities is shown in Figure 4-1 below. Other evidence suggests strongly that most users have learned a great deal about ICT:

- Most new users (84%) agreed or strongly agreed that they had already learned new skills which they would not have learned otherwise;
- After 6 months over three-quarters of these users (78%) said they had learned how to use a computer;
- Of those users who had gained a qualification after a year, almost all (91%) were ICT related.
- A third of users (34%) changed from lacking confidence with computers to being regular Internet users.

Figure 4-1 Percentage of respondents who had never used ICT for various activities

Source: Matched Initial User Survey and First Follow up survey respondents, n=1861
4.2 Progressing to further learning

Assessing the degree to which users progress to further learning is difficult because 'progress' from a variety of starting points can have many meanings. But there is good evidence that many users progress to a significant degree.

Figure 4-2 Average % of users progressing, according to centre managers

<table>
<thead>
<tr>
<th>Qualifications higher than NVQ Level 3</th>
<th>36%</th>
</tr>
</thead>
<tbody>
<tr>
<td>NVQ Level 3 courses or equivalent</td>
<td>30%</td>
</tr>
<tr>
<td>NVQ Level 2 courses or equivalent</td>
<td>23%</td>
</tr>
<tr>
<td>Learndirect</td>
<td>13%</td>
</tr>
<tr>
<td>Non-certificated intro courses</td>
<td>8%</td>
</tr>
<tr>
<td>Certificated intro courses</td>
<td>3%</td>
</tr>
<tr>
<td>Re-engaging in learning</td>
<td>2%</td>
</tr>
</tbody>
</table>

Source: Centre Manager Survey, All respondents, n=658

Centre managers report a wide range of progression – from re-engaging in learning through to progressing to qualifications higher than NVQ Level 3. Figure 4-2 shows that most users main progress through:

- re-engaging in learning (36%);
- non-certificated introductory courses (30%); and
- certificated introductory courses (23%).

According to our user survey, after six months most users (80%) had undertaken some form of learning at the centre – for 40% of users this was an intermediate level course or higher, as shown in Figure 4-3. Half of these users gained some form of certificate for their learning. Interestingly there was little difference between those that had not undertaken any form of learning for five years and those that had. After a year 43% of survey respondents had started a course leading to a qualification and 31% had completed such a course.

In interviews, users discussed progression in terms of new goals and ambitions:

"I got on so well with the first course that the tutor said there was no reason I couldn't do CLAIT, so I did” (man, manual worker 55-65)

"I wanted to get a certificate” (man, 25-35)

"I wanted to do something more challenging” (woman, 45-55)

"I found it interesting and thought I'd keep it going” (woman, 65+)
Figure 4-3 Users’ perspective: most advanced thing done at the centre

![Bar chart showing the percentage of users who did different levels of courses at the centre.]

Source: First Follow Up Survey, All respondents, n=1861

According to DfES monitoring data, the proportion of UK online centre users progressing on to further learning declined from 37% in the first quarter of 2002 to 21% in the first quarter of 2003. The interpretation of this is not clear but the first figure (37%) seems reasonably close to the 40% of users in our survey who say they did an intermediate level course or higher. We have taken the lower monitoring data figure as the more prudent estimate of progression.

4.3 Progressing to learning elsewhere

Centre managers claimed to help a modest proportion (around 10%) of their users to progress to learning elsewhere – courses at other learning centres, colleges and learndirect.

Users were more positive as Figure 4-4 below shows. One quarter said the centres has helped them at least 'a fair amount' to progress to learndirect courses, and one it ten to college.

Figure 4-4 Users who felt the centre helped them progress to learndirect or college/university

<table>
<thead>
<tr>
<th></th>
<th>Yes, a lot</th>
<th>Yes, a fair amount</th>
<th>Yes, a little</th>
<th>No</th>
<th>No response</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>learndirect</strong></td>
<td>14%</td>
<td>12%</td>
<td>19%</td>
<td>45%</td>
<td>10%</td>
</tr>
<tr>
<td><strong>College</strong></td>
<td>7%</td>
<td>4%</td>
<td>8%</td>
<td>69%</td>
<td>12%</td>
</tr>
</tbody>
</table>

Source: First Follow Up Survey, All respondents, n=1861
4.4 Progress to non-ICT learning

Although around 20% of users wanted to on to more advanced non-IT courses when they first went to the centres, only 8% had done this after a year. Project visits and learner interviews suggested that the centres were re-engaging people with learning of all types. Over the next two to three years we expect that more users will move on to further learning. For individuals the timescale for such movements can often be a matter of years rather than months.

4.5 Sectoral variations in learning progression

We have some evidence that different sectors do have different success levels in helping user to progress to learning. But the definitions of progress and learning differ too widely between the centres monitoring data, our managers’ survey and our user survey to provide robust figures. The data does tend to support expectations, in that Colleges appear to be more likely to help users achieve certificated courses at all levels.

4.6 Barriers to progressing to qualifications

Figure 4-5 highlights a wide range of reasons why, a year after starting at the centres, users did not progress to take qualifications. While cost is an issue, logistics and convenience are also important. Many of the learners we spoke to simply did not see qualifications as being relevant to them. Unemployed people wanted to gain qualifications to help them progress into jobs and some employed people had similar motivations. But other users were far more interested in learning new skills than in gaining qualifications.

Further learning equated to going to college. Many users (whether they said so or not in the surveys) were not comfortable with this idea, having fairly negative perceptions of colleges in general. We suspect that at least some of these perceptions were misplaced, suggesting some value more informal linking from college to UK online centre.

Figure 4-5 Main reason for users not taking qualifications (users’ view)

Source: Final Follow Up Survey, Respondents who did not pursue qualifications, n=216
4.7 Changes in employability

After six months there was no change in users overall employment status. Nevertheless around a third of users said that attending the centre had helped them improve their skills for work significantly. In total over a half said this had happened to some extent, as shown in Figure 4-6 below. Around 8% felt that attending the centre had made a significant contribution to helping them to get a job and 7% to get a better job or promotion.

**Figure 4-6 First Follow Up survey - progression to employment**

![Bar chart showing progression to employment](image)

Source: First Follow-up User Survey, All Respondents, n= 1861 ("no" and no response answers excluded for clarity)

"It will help me in my work“ (woman, 25-34)

"I can now help in my husband’s business“ (woman 45-54)

"It will look good on my c.v.“ (man 25-34)

"It’s opened up more opportunities - both now and as experience for future jobs.“ (single mother, 35-45)

Our second follow up survey had too low a response rate to give statistically robust results. It suggested there might have been a change in employment status of users after a year: percentages in full time employment were higher and proportions in part-time or short-term employment were lower.

- More were in full time employment (14% as opposed to 9%).
- Fewer were in part-time employment for less than 16 hours per week (7% as opposed to 14%).
- Substantially fewer were unemployed under 6 months (1% as opposed to 4%).
- Substantially fewer were in receipt of some form of incapacity benefit (3% as opposed to 9%).

If all the centres replicated these results from June 2002 to March 2003, then large numbers of users would have progressed to employment.
4.8 Determinants of successful progression

Analysis of our survey data to identify correlations suggests that progression to learning links in various ways to:

- age – the older the centre user, the less likely they are to progress to further learning;
- staff encouragement – there is a positive link between encouragement to learn and progression;
- advice – there is a positive link between staff providing advice on qualifications and users progressing to further learning; and
- continued attendance – there is a positive link between continued attendance at the centre and progression to further learning.

On the other hand gender, possession of a home computer, the target group, and learning undertaken previously appear to have no link.

Progression to a job is affected by:

- the extent to which the individual user has looked on the Internet for a job;
- age – success in securing a job drops with age; and
- to a lesser degree, if the user was unemployed before attending the centre.

On the other hand the level of course undertaken, qualification achieved, the target group of the user (apart from employment status) and whether they are still at the centre, make no impact.
5 Other Outcomes

A few users have gained home Internet access. Almost all refer to benefits in terms of increased confidence and social contact. For many people, this is the most significant result of the programme.

5.1 Changes in Internet access at home and work

There has been an increase in home access to computers and to the Internet among centre users. When they started attending the centres, 64% of respondents to the follow-up user survey had home access to a computer and 41% to the Internet. Six months later, 71% had access to a computer at home and 47% access to the Internet. They also had modestly increased access at work and college. Users from the socially excluded target groups were more likely than the average user to have acquired a computer, and over 65’s the most likely.

Most of these users (59%) claimed that they would have gained Internet access anyway – reinforcing the impression that centre users are those who already have an interest in ICT. Around 13% of those who had bought or secured home Internet access suggested that they would not have done this if they had not gone to the centre, and a further 28% suggested that attending the centre had helped them to decide. However, even for those who already had Internet access when they first came, the centres were an important source of skills and confidence in using it.

5.2 Use of e-government and other online services

Around 40% of users have accessed e-government services at least once, although only 19% have done so more than six times. Centre managers estimate that their staff show these sites to around one-third of users – the same proportion who enquire about them. There is a strong link between centre staff showing users e-government sites and frequency of use – shown in Figure 5-1 below. It appears that many centre staff are not proactive about introducing users to e-government sites. This is probably because lower income groups often have limited reasons to use these sites. This may change as the number of useful sites, such as NHS Direct, increases.
5.3 Increase in confidence and social contact

The clearest results for centre users were in soft outcomes such as increases in confidence and increased social contact. 79% of users felt that coming to the centre had increased their confidence to some extent and 38% reported this “a lot”.

This was a constant theme with most users we met in most centres. They felt that learning that they could overcome one threat (using computers) had helped them become more confident. Similarly most people who had not been in learning for some time told us that they had rediscovered learning in general, not just about ICT.

"The centre has changed my life. It’s given me more knowledge and helped me to communicate.” (new learner, 45-54)

"It’s changed everything! I’ve got a spark now. The centre is great because it makes my brain work and gives me a place to go every week.” (new learner with Downs Syndrome, 25-34)

"I’m not so frightened about coming along.” (new learner, 65+)

New users from the socially excluded groups were 10 percentage points more likely than others to feel the centre helped them improve their confidence “a lot”. Six months on, they were still 7 percentage points more likely than others to feel their confidence had been helped by coming to the centre. Those using the centres over a lasting period of time felt the greatest impact.

Most users recognised the benefits of learning how to use computers and the Internet. But for 48%, the single ‘best thing about coming to the centre’ after 6 months was meeting other people. Only 17% of new users listed this as one among several reasons for attending, so it seems that this was an unexpected
and major outcome for users. Figure 5-2 below shows other (user defined) reason for attending.

**Figure 5-2 The best thing about coming to the centre - users after 6 months**

![Bar chart showing the best thing about coming to the centre - users after 6 months](chart.png)

Source: First Follow Up Survey, All respondents, n=1861

5.4 Literacy and numeracy

The prospectus targeted people needing help with “basic skills”. During this study we equated basic skills with literacy and numeracy skills only. Questionnaires asked about “reading and writing” and “numbers and arithmetic”.

One in ten (10%) centre users claimed to have at least some difficulty with reading and writing, and 15% at least some difficulty with numbers and arithmetic. Six months on their self-reported ratings of literacy and numeracy levels had not changed.

Nevertheless our interviews with users and project visits suggest that identifying and working on basic skills is a key activity in many UK online centres. We found many examples of centres that provided a setting where users identified literacy and numeracy difficulties they had never discussed before. The timescale of our study may have been too short to identify changes in skill levels – the fact that many users had identified difficulties and asked for help is a positive and important benefit.

5.5 Community and family benefits

Many centres have a community setting (whichever sector is running them). UK online activities therefore often take place alongside other community learning and community development activities. Many users report increased involvement in the community since attending the centre and some report benefits for their wider family.
5.5.1 Community benefits

After six months one fifth (20%) of users had been helped “a lot” or “a fair amount” to be more involved in their community.

The programme has also led to wider community benefits in an indirect way. Many community-based centres have found that the UK online centre part of their operation has had knock-on effects on other aspects of their service. These may have been financial benefits, or raising the profile of the centre or improving the impact of existing services by using ICT.

Similarly many colleges were able to develop community based provision and new approaches to learning through their UK online centres. These benefits are clear in project visits but difficult to quantify.

5.5.2 Family benefits

After six months, almost two thirds (63%) of users with children under 18 living with them said coming to the centre had helped them to help their children with homework. In interviews, many users told us they wanted to learn about ICT so they could catch up with their family.

- Parents of young children said they wanted to learn about computers so they can teach their children before their children learned at school.
- Parents of older children felt they should get to know what their children are doing.
- Older people learning about ICT said that it helped them gain credibility and increase contact with children and grandchildren.

"Now I can speak the same language as my family" (man aged 55-64)

"I used to feel so far away, but now I often help my grandchildren in other countries with their homework." (woman aged 55-64)

"My kids are more interested in their schoolwork now and they tease me to ask if I’ve done my homework for my ICT course." (mother, 25-35)
Managing Centres

Centre managers faced several challenges to develop and run their centres effectively. Revenue funding was the single most difficult issue. Despite this, many centres have developed a wide range of good practice – although others are not aware of the help and resources that are available.

6.1 Staffing

Early in the project, many centre managers experienced difficulty with recruiting staff. As centres became more established they found that recruitment became easier, but nearly half of centre managers said the problem persisted. Community and Voluntary sector centres experienced particular recruitment difficulties, as shown in Figure 6-1 below.

Almost half (44%) of centre managers experienced at least some difficulty, of these:

- 52% found there were not enough people with the right skills;
- 52% said they could not pay enough to attract the right people;
- 46% said that short term contracts were not attractive; and
- 20% said they had inadequate resources to advertise properly.
Half of all centres (50%) of centres had all their staff positions filled 95% of the time or more. But 8% of centres claimed to have had all their staff positions filled less than half of the time they were open. Clearly this would create significant operational difficulties.

### 6.2 Opening hours

When we surveyed centres in Spring 2002, there was considerable variation in the times of the week that the centres were open, shown in Figure 6-2 below. A third of the centres were only open parts of days or a few days a week. Less than a third were open at weekends. Opening hours are not a fixed feature and we know that many centres have increased and decreased their hours, mainly depending on funding.

We do not have more recent data but our centre visits found many centres that had restricted opening hours. We suggest that the opening hours should be part of the centre monitoring data in order to obtain a true picture of UK online centre coverage.

#### Figure 6-2 Opening hours

<table>
<thead>
<tr>
<th>Opening hours (or closest)</th>
<th>Centres responding</th>
</tr>
</thead>
<tbody>
<tr>
<td>2-3 half days a week</td>
<td>15%</td>
</tr>
<tr>
<td>Half days, five days a week</td>
<td>17%</td>
</tr>
<tr>
<td>9-5 Monday to Friday</td>
<td>13%</td>
</tr>
<tr>
<td>9-5 Mon-Fri, &amp; some evenings</td>
<td>27%</td>
</tr>
<tr>
<td>9-5 Mon-Fri, &amp; evenings &amp; weekends</td>
<td>24%</td>
</tr>
<tr>
<td>Seven days a week</td>
<td>4%</td>
</tr>
<tr>
<td>24 hours, 7 days</td>
<td>.4%</td>
</tr>
</tbody>
</table>

Source: Hall Aitken, Early Centre Manager Survey (n=258)

### 6.3 Revenue budgets

We have reported on the issues surrounding revenue funding for Community and Voluntary based centres in Chapter 8.

There was some concern among centres in all sectors that changes and cuts in revenue funding will limit the success in certain areas in the future. NOF CALL funding will run out over the next year or two. Many centres depended on this funding for key aspects of their service – from staffing (50% of centres) to promoting the centre and attracting new users (42% of centres).

Figure 6-3 below suggests that centre managers expected that there would be a gradual shift away from providing access and outreach activities towards higher-level courses and improved service quality. FE Colleges in particular expect to reduce the amount of development work they undertake.
Figure 6-3 Centre manager survey: impact on services from changes in revenue funding

<table>
<thead>
<tr>
<th>Service</th>
<th>Reduce</th>
<th>Stay the same</th>
<th>Increase</th>
<th>No Response</th>
</tr>
</thead>
<tbody>
<tr>
<td>Drop-in access</td>
<td>26%</td>
<td>33%</td>
<td>18%</td>
<td>23%</td>
</tr>
<tr>
<td>Development work</td>
<td>25%</td>
<td>22%</td>
<td>23%</td>
<td>30%</td>
</tr>
<tr>
<td>Outreach</td>
<td>23%</td>
<td>24%</td>
<td>17%</td>
<td>35%</td>
</tr>
<tr>
<td>Focus on disadvantaged people</td>
<td>21%</td>
<td>29%</td>
<td>23%</td>
<td>26%</td>
</tr>
<tr>
<td>Intro courses</td>
<td>21%</td>
<td>32%</td>
<td>23%</td>
<td>24%</td>
</tr>
<tr>
<td>Intermediate courses</td>
<td>18%</td>
<td>30%</td>
<td>23%</td>
<td>29%</td>
</tr>
<tr>
<td>Quality of service</td>
<td>18%</td>
<td>23%</td>
<td>33%</td>
<td>27%</td>
</tr>
<tr>
<td>Advanced courses</td>
<td>17%</td>
<td>28%</td>
<td>19%</td>
<td>36%</td>
</tr>
<tr>
<td>ICT focus</td>
<td>17%</td>
<td>37%</td>
<td>18%</td>
<td>28%</td>
</tr>
</tbody>
</table>

Source: Centre Manager Survey, All respondents, n=658

6.4 Support for managers

The pilot UK online centres (Pioneer and Pathfinder centres) provided several lessons – including the need for support for centre managers. The Pioneer and Pathfinder evaluation recommended the “establishment of a number of support mechanisms:

- Availability of development funding for innovative projects;
- Provision of a networked (web, Internet, telephone) support service to provide technical, and operational support and exchange of good practice purposes;
- Provision of a similar and linked support service for new projects’ development;
- A series of seminars for potential and actual project providers; and
- A central procurement service and some form of recommended configuration for different project types.”

DfES funded support efforts during the programme rollout through ‘Help is @ Hand’. This service provided a website and linked discussion group giving support and resources to all UK online centres (including those that are not CMF funded). It was run by BECTA.

Over half of all centre managers (52%) used the ‘Help is @ Hand’ website and 72% of them rated it as quite valuable or very valuable. Only 10% used the discussion group and only a few managers found the discussion group useful.

DfES also funded ‘Direct Support’ to support identified Community and Voluntary sector projects. Government Offices to also provided support, varying from region to region. We did not ask managers about either of these services.
6.5 Future support needed

Figure 6-4 below summarises the extra support that managers would like to receive. Over 60% of centre managers would find practical how-to guides valuable in the future. This reflects our discussions with managers who are often working with limited time and would value high-quality practical resources.

We visited many centres where staff were not aware of the range of resources that do exist. Many were ‘reinventing the wheel’ by designing their own introductory activities and programmes, for example. So an active programme of awareness raising for centre staff about available resources might be useful.

Figure 6-4 Kinds of support services managers would find useful in the future

<table>
<thead>
<tr>
<th>Support Service</th>
<th>% of centre managers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Practical how-to guides</td>
<td>61%</td>
</tr>
<tr>
<td>Web-based resources (such as Help is @ Hand)</td>
<td>48%</td>
</tr>
<tr>
<td>Workshops</td>
<td>44%</td>
</tr>
<tr>
<td>Phone-in advice service</td>
<td>31%</td>
</tr>
<tr>
<td>Buddy/mentor system between centres</td>
<td>28%</td>
</tr>
<tr>
<td>Discussion group (such as Help is @ Hand)</td>
<td>11%</td>
</tr>
<tr>
<td>Other</td>
<td>8%</td>
</tr>
</tbody>
</table>

Source: Centre Manager Survey, All respondents, n=658

6.6 Support to promote e-government services

Promoting e-government services is one of the potential future roles for UK online centres. Some 60% of managers feel “somewhat equipped” for this role, but 15% say they’re “not equipped at all”. Managers would like support for this role including:

- newsletters on new sites (64%);
- training for staff (61%);
- interactive learning modules on government services available online (60%);
- more staff to provide drop-in access (53%); and
- links with Local Authority information officers (49%).

6.7 Effective provision

We visited over 100 UK online centres, where we held discussions with users, interviewed staff and observed activity. Because we carried out this work in the early part of centres’ development, most of our evidence relates to effective ways of attracting users and catching their interest. In the later part of our study we focused on what made centres successful with users in each of the six target groups. We have summarised the design features and operational practice that made most difference below.
6.7.1 Design different services to suit different users

Over half of the centres we visited had no specific target groups. They aimed to serve all the local community and provided a package of ‘tasters’, drop-in access and programmed courses. Typically these centres attracted a similar mix of women (with children and not in full-time employment), older people and some unemployed people.

Other centres were designed to target specific groups – for example:

- based in pubs and football clubs to target mostly men;
- open in the evenings to target younger people and those in work;
- based in an existing centre providing services to a specific ethnic group;
- taking laptops to sheltered housing to target elderly people; or
- next to their own crèche to target parents of younger children.

A small but increasing number had programmes aimed at different groups at different times. There was no standard pattern but the targeting took the form of, for example:

- a games and music evening for young people two nights a week;
- a quiz night for older people on another night;
- targeted daytime courses for ‘silver surfers’ at one time and parents at another during the day; and
- an afternoon job search session.

Overall we concluded that most UK online centres were not and could not be a resource for all the local population. But thoughtful design does lead to success in targeting almost any selected group. It is easier to target a few groups than all groups.

6.7.2 Collect and use good management information

Although most centres provided regular returns to Government office and DfES, they collected the basic data in a wide variety of ways. Some centres used IT based log in and activity monitoring systems, others simply estimated the number of users for the period. Few centres gathered information on users prior experience of ICT or access to ICT outside the centre. As a result most centre managers assumed there were lower levels of prior skills and access than our user survey showed. Since the programme focused on those with low levels of skills and ICT access, monitoring data should have checked this.

Successful centres usually had a clear system for gathering initial information about users and tracking their usage levels. Most had limited information on clients’ progress on leaving the centre.
6.7.3 Plan marketing carefully

Because UK online centres are very varied, there is no standard formula for reaching the target groups. But at the centres we visited some approaches were particularly successful.

*Locating in a place where the target groups already visit.* We visited many UK online centres based in existing community centres that were already used by the target groups. This approach was successful in targeting these existing users. Some people tend to gather only in commercial venues, so centres in sports venues and pubs have also been successful. Other projects were based in foyers (part of targeted housing projects) and schools.

*Using large clear signage.* Few of the centres we visited had clear signs outside saying what was on offer – such as ‘free Internet access here’. Even some high street centres gave much greater prominence to their name than what they were offering. But a significant number of users first came across centres in passing and better signage encourages more of this ‘passing trade’.

*Developing special interest activities.* Some UK online centres have a strong theme, often based around music and video production. We visited one where a focus on music production and editing was successfully engaging younger people. Several have developed activities based on Digital Photography, video editing, printing T-shirts, making Christmas cards and other media and arts projects. Many centres we visited had successfully attracted new users with these approaches.

*Reaching parents through children.* Centres had different approaches to reaching parents through their children. Some school based centres provided time for children in school hours or as an after-school homework club. The children then spread information to their parents about the centre and some came along to try it out. More programmed targeting also worked – introducing parents to the computer games their children play, courses to understand and support homework, and family activity days.

6.7.4 Create a positive environment

*Encourage peer support.* As we visited centres and discussed their experience with users, it was clear that informal support between users was important. Many came in pairs – friends, adult daughters and mothers, couples and so on. While a tutor might be busy helping others, people asked each other for support. Users rated this as important in our surveys too. Centres can promote this type of working by placing computers in pairs and encouraging mutual support in their approach. Many community run projects provided pathways for more experienced users to become trained volunteers, building further on this idea.

*New equipment, furniture and décor are important.* UK online centres were often the best looking part of the buildings they were based in. Users often told us that they appreciated the up-to-date equipment and pleasant surroundings. We formed a strong impression that this, along with the relaxed staff approach was one of the key reasons for many centres’ success in keeping users interested.
Informal layout is better than classroom layout. Many centres were laid out as ICT classrooms and seemed to have users that were looking for classes already. Others were much less formal, had music playing, posters on the wall, photographs of users and occasionally a café. Some were small and crowded but still achieved an informal atmosphere that appeared to be attractive for people who were just starting to consider learning about ICT.
7 Overall outputs and impacts

The programme may have led to some wider impact in the target wards. Combining the evidence from various sources, we can infer that many thousands of users have become re-engaged with learning, achieved qualifications and developed confidence.

7.1 Impacts in the 2,000 most deprived wards

7.1.1 Access to the Internet

The rate of Internet use has increased slightly more slowly in the wards targeted by CMF funded UK online centres than in other areas, between 2001 and 2002. Figure 7-1 shows the percentage of the population using the Internet, split by electoral ward quartiles according to the Deprivation Index. The 1st quartile of around 2,100 wards approximates to the targeted 2,000 most deprived wards. On the whole the divide between the most deprived areas and the rest widened during this period despite a fall of almost one million in the number of non-Internet users in these wards.

Figure 7-1 Internet use by MDI Quartile

![Internet use by MDI Quartile](image)

Source: ONS, Family Expenditure Survey, and DTLR Deprivation Index

So it appears that the UK online centre initiative has not (at least not yet) closed the digital divide between the most deprived wards and other areas.
7.1.2 The Use of the Internet

Compared with the rest of the population, lower proportions of Internet users in the most deprived quartile use it for e-mail, finding information on goods and services, buying goods or services or banking. But the gap has narrowed since 2001 in terms of e-mail use from 8% to just 4% difference. Figure 7-2 below shows that the proportions of the adult population in the most deprived quartile who used the Internet to look for jobs and to get information for school or education is close to the rest. This is despite having lower levels of Internet access.

Given the high proportion of unemployed people using UK online centres, it is reasonable to infer that the UK online programme contributed to the high proportion of adults accessing jobs information online. The numbers using the Internet for getting information on education and schools may also be partly because of the UK online programme.

Figure 7-2 Uses of the Internet as a proportion of all adults (July-Sep 2002)

Source: ONS, Family Expenditure Survey, and DTLR Deprivation Index

7.1.3 Reasons for not using the Internet

There have been gradual changes in the reasons people give for not using the Internet. While issues of cost and access have become less significant, lack of interest is consistently the most common reason given. But as Figure 7-3 shows, the proportion stating lack of interest among the most deprived quartile has dropped steeply from 46% to 39%. This represents a decrease of 872,000 in the number of non-interested non-users in the most deprived quartile. The most deprived quartile accounted for two thirds of the total drop-in this category.
Levels of home Internet connection remained low in more deprived neighbourhoods but some 320,000 adults in target groups have used UK online centres. So it is reasonable to infer that the UK online centre programme has contributed significantly to this change.

Half of all those who said they lacked skills or confidence to use the Internet lived in the CMF funded UK online centre target wards. This is disproportionately high given the breakdown of non-users and suggests there is still a significant job for the centres to do. It confirms that tackling confidence is a key task.

The proportion stating that they have no access or that they are not interested is in line with the proportion of non-users who lived in these wards (43%).
7.2 Programme outputs

We can infer gross and net outputs by combining figures from our survey data with DfES monitoring data. Our survey results are broadly representative of the estimated 118,503 target users during the main research phase. We have therefore estimated outputs for this group. We discussed earlier (section 1.6.4) the contradictory evidence that:

- Our survey results for rounds one and two are representative of all three rounds; and
- Later users progressed or will progress in the same way as the earlier users in our surveys.

Given that we cannot reach a firm conclusion on this, we have shown what the estimated outputs would be if these assumptions hold true.

7.2.1 Deadweight, displacement and leakage

‘Deadweight’ is activity that would have taken place anyway. ‘Leakage’ is activity that provided support to people not in the target groups.

**Leakage** - We have identified leakage as the use of UK online centres by people who claimed to have both functional Internet access (that is at home, work or college) and the skills and confidence to use it. We have some evidence to suggest that some of these people were not actually fully skilled (section 2.3.1). Therefore this method gives an upper limit to the estimate of leakage at 26% (see Figure 2-6 for a more detailed breakdown).

Given that the Government funded centres primarily to meet the needs of adults, we also consider users aged under 16 as leakage. From monitoring data we can calculate that this age group made up 9% of all users. The total leakage is 32% of users.

**Deadweight** is less clear. Early in the evaluation we identified that it might have occurred in three different ways and we have assessed each below.

**Project level deadweight** – the project would have been funded or gone ahead anyway. Without a detailed assessment of the funding and plans of each applicant we cannot make a firm assessment of this. But in our project visits it was clear that almost every centre was in a location that had been set up specifically for the UK online project. Early activity was new in that, at the least, it targeted groups that would not have been involved in similar provision previously. For example a college setting up an outreach base in a target community.

**User level deadweight** – the user would have bought a PC and paid for Internet access. In interviewing users at over 90 centres we did not meet this. Instead attending the centre encouraged some users who would not have bought a PC or Internet access to do so.

**Displacement** – a form of deadweight where the user would have used another centre. Some of the group we have identified above under leakage may have
had an alternative in using some form of public access Internet point. Some 15% of users without functional Internet access claimed to have the skills and confidence to use computers. They might therefore have been able to use other centres – particularly through the People’s Network in libraries once they became established. Fewer would have used locations requiring any form of payment. As with our leakage calculation, we found strong evidence in project visits and in other parts of our survey data that numbers in this position were, if anything, overstated.

Overall we conclude that we cannot identify significant deadweight in the programme. We conclude that the leakage figure is the upper limit of those benefiting who did not require the service during our research period.

But we cannot confirm that this position has remained constant. Our evidence from manager surveys and project visits is that funding needs propel centres towards providing more conventional packaged training. There is a danger that the informal supportive atmosphere that attracted the new users may be lost. Eventually centres might simply provide services that would have taken place elsewhere and become much less additional.

To calculate programme impacts on individuals, in the following assessments, we have:

- Excluded users under 16; and
- Excluded users who said they had Internet access and the skills to use it.

These figures are therefore for net, rather than gross impacts.

7.2.2 Using the Internet

Before coming to UK online centres, 41% of target group users had never used the Internet for any purpose. So up to June 2002 around 49,000 target group adults (between 44,000 and 53,000) had the opportunity to use the Internet for the first time at a UK online centre. If we assume the same trend for all adult target users up to March 2003, this would equate to around 130,000 people (Depending on the numbers of new users, we estimate a range of between 119,000 and 142,000).

Some 36,000 target group adults (31%) sent their first e-mail while attending a UK online centre up to June 2002. If we project the same rate to March 2003 this would mean around 99,000 adults sent their first e-mail at a UK online centre (between 90,000 and 107,000).

7.2.3 Increasing confidence

Most adult users felt that attending the UK online centre had increased their confidence. A substantial 40%, or 47,000 increased their confidence to a great degree up to June 2002. Assuming this rate was sustained up to March 2003,

5 The ranges quoted in this and following sections are based on different estimates of the numbers of new users. For further detail see the technical appendix.
this would mean approximately 128,000 target adults improving their confidence to a significant degree (between 116,000 and 139,000).

7.2.4 Re-engaging in learning

A high proportion of new users (41%) claim not to have attended a course in the last five years. Centre managers estimated that 36% of users re-engaged in learning, confirming this figure. We can therefore say that the centres have helped 47,000 target adults re-engage in learning up to June 2002. Continuing this rate up to March 2003 would increase the number of adults re-engaging to around 127,000 (between 117,000 and 139,000).

And 84% of users said they had learned new skills that they would not have learned otherwise. Up to June 2002 this equates to 101,000 adults. In the overall adult target user population to March 2003 this amounts to 272,000 (between 248,000 and 295,000).

7.2.5 Progressing to further learning

It is less easy to arrive at an estimate of the numbers progressing to further learning, as there is no precise definition of such progress.

According to monitoring data, the proportion of UK online centre users progressing on to further learning declined from 37% in the first quarter of 2002 to 21% in the first quarter of 2003.

Taking the monitoring data as providing the lowest and most reliable estimates, 67,000 adults progressed to further learning at UK online centres up to March 2003 (between 61,000 and 73,000).

7.2.6 Qualifications

Centres often provide certification for introductory courses. This may be a local certificate or may be for an accredited course such as CLAIT. After a year, 31% had gained some type of qualification. We have further data on the types of qualification but at sample sizes that do not allow extrapolation.

We can estimate that up to June 2002 about 34,000 target adult users may go on to achieve some form of qualification because of attending a UK online centre. If we apply this trend up to March 2003 the total increases to 93,000 (between 85,000 and 101,00).

7.2.7 Progress to employment

After six months, 8% of users said that using UK online centres helped them to get a job. A further 7% said it had helped them to get a better job. After a year 6% of users had moved into full-time work.

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6 Data from the surveys suggest that the figures may be higher, with around 30% of users claimed to have progressed to lemdirect or a course at NVQ level 2 or higher after one year. However, the relatively small numbers involved in the later user surveys mean that these figures are not statistically robust.
As UK online centres have not (in the main) focused on securing jobs for people, we can assume that they have contributed to, but are not the key cause of, changes in employment status.

So we can estimate that up to June 2002 around 9,500 users felt that UK online centres have helped them progress to secure a job to some degree, but we cannot quantify this further. Applying the same rate to all adult target users up to March 2003 suggests that UK online centres assisted 25,500 people to progress to a job some extent (between 23,000 and 28,000).
Assessing additional revenue for community led centres

Small additional revenue grants to Community and Voluntary sector centres helped them to improve their services or open earlier. But the effects were short-term. There is a case for providing longer term funding for these centres.

8.1 Introduction

Following early concerns that Community and Voluntary sector centres were experiencing more problems because of revenue funding shortfalls, DfES made small sums of additional funding available. Regional Government Offices distributed the additional money based on need. In total 201 projects received around £25,000 each.

8.2 Spending focus

Projects spent most funding on staff costs with small sums spent on other outgoings. Other spending included targeting groups, publicity, connectivity, software, training and consultancy fees.

Figure 8-1 Share of funds

Source: Hall Aitken Telephone Survey 2002 n=41 Note: The sample accounts for £883,229 of additional revenue funds.
Figure 8-1 shows the split of spending by amount spent. Projects that had not started were more likely to use the funding for one-off or irregular buys such as learning materials, course development and wireless networks. One project used additional money to carry out early research into the specific needs of its disabled client groups.

### 8.3 Outcomes

Additional revenue funding brought more users, widened the range of users and increased the support available to them. It helped projects waiting to start to prepare and plan their opening. For those already started, it contributed to improvements in staff and user support, activities and opening hours.

As shown in Figure 8-2, projects felt that greater support of staff and users is the main outcome of the additional revenue funding. On average, projects outlined 5 benefits from receiving additional revenue funding.

![Figure 8-2 Benefits reported by projects](image)

**Figure 8-2 Benefits reported by projects**

Outcomes cited included:

- Freeing up time to devote to delivery and user support;
- General interest increased and more users;
- They would achieve targets;
- Increases in numbers of hard-to-reach users; and
- More attractive and accessible services for hard-to-reach groups.

For projects that had not started, the outcomes included:

- Filling a funding gap that allowed the project to start earlier; and
- Ensuring the project would open rather than fail to do so.
8.4 A simple funding source

The additional revenue funding was seen as flexible and easy to apply for and report on. Even those that failed to get the funding are unlikely to have wasted too much time on the application.

There were three key factors that made the funding popular with recipients:

- **Prompt payment** – The application process was short, simple and quick.
- **Flexible** – Unlike many existing funding streams money allowed projects to work on their own priorities, whether this was getting it started or attracting hard to reach groups.
- **Simple reporting** - GOs and DfES asked projects to report on the fund using *existing* forms.

8.5 Other funding sources are more complex

Projects identified several problems with the main budgets that contributed to their CMF funded UK online centres.

- The approval of capital contracts was slow.
- Projects got much less CALL funding than they applied for.
- The Managed Service Provider (MSP) arrangement did not suit every project.
- Other revenue funding streams were difficult to manage and report on.
- Getting funding needed special skills and often partnerships. Projects have little time to develop either.

The general funding problems were wearing down staff; especially centre managers who dealt with all aspects of applying for and managing funds. These frustrated staff and resulted in much unpaid overtime.

8.6 Additionality

Additional revenue funding went to projects with poor CALL to CMF ratios and a poor mix of funding streams, which fitted earlier recommendations for granting funds. Without the funding, many projects saw a negative future. Non-funded projects had a better mix of funds, better revenue-to-capital ratios and less of a history of funding problems. This comparison supports the conclusion that the funding produced additional benefits although the precise level of such additionality could not be quantified at this stage.

8.7 Sustainability

Some projects will run for a little longer because of the additional funding. Initially projects believed their service would suffer after the additional revenue funding ran out. Our follow-up assessment showed that service standards did not fall among the projects that we contacted for the follow up interviews. But
we could not contact one-third or the projects (35%), and it seems reasonable to assume that most of these faced greater difficulties. The gains were short-term and have not fundamentally altered how projects run. Overall, projects are optimistic but apprehensive about their future.

8.8 The case for addressing vulnerable UK online centres

8.8.1 Who are the vulnerable centres?

DfES assumed that Community and Voluntary sector centres are more vulnerable than others to closure because of lack of funding. This seems a reasonable assumption because most Community and Voluntary organisations are heavily dependent on year-to-year, insecure grant funding. Our surveys and project visits confirmed this position. Often the more secure centres were those that had formed partnerships with local FE colleges.

8.8.2 How many vulnerable centres are there?

We estimate, from our centre manager survey, that the Community and Voluntary sector lead 45% of all CMF-funded UK online centres. Nationally this equates to 1,350 vulnerable centres out of an estimated national figure of around 3,000 CMF-funded centres.

8.8.3 What is their added value?

Community and Voluntary sector centres are significantly better than other sectors at reaching excluded groups.

- In the initial user survey (2001/2), 69% of users at Community and Voluntary sector centres fell within one of the target groups. This compares to 61% for Local Authority centres and 57% for FE and HE centres.
- Figure 8-3 shows that managers’ estimates confirm this, with Community and Voluntary sector centres being most successful at attracting every group apart from over 60-year olds new to learning.
- 49% of users at Community and Voluntary sector centres already had Internet access, compared with 55% at Local Authority run centres and 57% at FE run centres. Centre managers confirmed that Local Authority and FE centres were less successful at attracting people with low skills, low interest in using ICT or no home access to the Internet, again shown in Figure 8-3.
- The average excluded new user of community-based UK online centre falls into 1.50 of the 6 target groups (1.68 according to the manager survey). But excluded users in FE run centres are less at 1.42 (1.36) and Local Authority run centres are less again at 1.39 (1.42).
More Community and Voluntary sector centres attract volunteers than those run by Local Authorities or FE, as shown in Figure 8-3. They attract almost 3 times as many volunteers (4.5) as Local Authority run centres (1.6) and FE run centres (1.6).

Figure 8-3 – Users and volunteers by sector
8.8.4    **Higher unit costs**

Set against the greater success in reaching the target groups, Community and Voluntary sector centres have higher average unit costs than other sectors, shown in Figure 8-4. FE and Local Authority centre managers may have understated centrally managed costs, for example connectivity and building overheads.

**Figure 8-4 unit costs per sector**

<table>
<thead>
<tr>
<th>Unit</th>
<th>Voluntary/Community</th>
<th>Local Authority</th>
<th>FE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Any user</td>
<td>£143</td>
<td>£104</td>
<td>£83</td>
</tr>
<tr>
<td>New user</td>
<td>£307</td>
<td>£256</td>
<td>£212</td>
</tr>
<tr>
<td>Excluded user</td>
<td>£281</td>
<td>£220</td>
<td>£213</td>
</tr>
<tr>
<td>Having a volunteer</td>
<td>£20,757</td>
<td>£44,020</td>
<td>£42,768</td>
</tr>
</tbody>
</table>

Source: Hall Aitken Centre Managers Survey 2003, All respondents, n=658

While the actual differences may be less than our analysis suggests, we expect that Community and Voluntary sector centres will have higher unit costs than other sectors because of their small scale. If we weighted users’ ‘degree of exclusion’, then costs would be closer.

8.8.5    **Gross cost of £100M**

Based on information provided by 152 Community and Voluntary sector centres in the centre manager survey, the average annual cost of running each of these centres was £76,760. This comprised an average staff budget cost of £47,316 and other running costs of £29,444. The gross cost of running all 1,350 of these centres would be £103,626,000 or around £100M.

8.8.6    **An annual funding gap of between £10-34M**

The £25,000 awards of additional revenue funding made a large impact on Community and Voluntary sector centres. The annual cost of rolling this out to all Community and Voluntary sector centres would be £34M.

The total NOF CALL funding over 3 years was £69M. The proportionate share of Community and Voluntary sector centres would be £31,326,000. Replacing this would cost around **£10.5M for one year**. The actual cost would be higher as many projects used their grant over less than three years.

7 Includes – training, insurance, expenses, etc.
We can conclude that the Community and Voluntary sector centres:

- Are more successful at attracting disadvantaged groups than other sectors and therefore play an important role;
- Are more vulnerable to funding fluctuations (as with all the sector) and have less certainty about future funding than centres from other sectors; and
- Could be retained at an annual revenue cost of between £10M and £34M.
9 The Future of UK online centres

9.1 Background

In late 2002, the roll out of the CMF funded UK online centres was complete. DfES passed management of the whole UK online centre initiative, including the non-funded centres, to UfI from 1st April 2003. Many other centres with similar goals, not formally branded UK online centres, have been developed throughout the country. Some of these are set within area wide strategies and networks, while others are stand-alone initiatives. So although this is chiefly a summative evaluation, it is useful to extract lessons for the future, for UfI and other agencies with a strategic remit.

Over the last two to three years there have been several research studies and evaluations covering similar ground to this study. We have reviewed these in the Appendix - Context and other research, at the end of this report. We have drawn on this wider body of research in developing recommendations on:

- The role of Public Access Internet;
- The important role of the Community and Voluntary Sector;
- Future funding and sustainability;
- Progressing to learning;
- Maintaining the wider benefits of UK online centres; and
- Monitoring and management information.

9.2 A role for public access Internet services

9.2.1 Physical bridges across the Digital Divide

One of the goals of UK online centres was to provide access to the Internet to people who did not have it. This was part of achieving the Government’s goal that everyone who wants access to the Internet should have it by 2005. One measure for this has been suggested as a public access Internet location within one mile of everyone in urban areas and 5 miles in rural areas. The assumption is that one way of tackling the ‘digital divide’ is to provide free or cheap public Internet access to those who cannot afford home access.

9.2.2 The need for functional access

But many users we spoke to felt that their new ICT skills were of limited use unless they secured home Internet access. For projects taking laptops out into the community this was severe – users had discovered new opportunities they could not follow up. Other evidence supports the idea that, in the UK at least,
public Internet access is not well used and may not be a major method of longer-term access for excluded groups.

- Only a small proportion of adults rely on non-domestic access to the Internet. And this has decreased from 13% of adults in August 2001 to 8% in November 2002\(^8\).

- Cardiff University carried out a study into the use of public ICT sites during the summer of 2002\(^9\). They found that just over a third of respondents reported having access to a public ICT site, but only 11% of the sample made use of it. Their data suggest strongly that ‘functional’ access means having access at home, work or college.

- They also found that experienced users were more likely to use public ICT sites – 71% of the users of public sites had at least five years experience in using ICT. The groups targeted through UK online centres are not in this group.

- Alternative access points tend to be most popular with those who also have Internet access at home\(^10\).

- The Cardiff study (like the ONS and other recent research\(^11\)) examined why people were not using the Internet. By far the biggest reason is a lack of interest. Taking these motivations into account it concluded that “At least 74% of non-users of ICT...would be unaffected by access to ICT via public sites – at whatever level”.

- In our research, it was clear that those with home access made much greater use of the Internet than those without it.

This quantitative evidence, combined with our discussions with users, suggests to us that public Internet access alone will not provide a major bridge across the ‘digital divide’. The Internet is useful for ordering goods and services, communicating with others and accessing information quickly. If this involves travel to a centre with limited opening hours and perhaps some charge, many of the benefits disappear.

As with any conclusion relating to ICT, our analysis may have missed developing trends. As the population in general (and young people in particular) become more comfortable with the Internet, the position may change. Commercial offerings are still developing and again may change the picture. Internet access by television may develop a bigger following and this again could have an effect.

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\(^{8}\) Oftel, 2001 – 2003; Consumers’ Use of the Internet

\(^{9}\) Selwyn N, 2002; Widening access to ICT via public sites – a research report

\(^{10}\) Oftel, 2001 – 2003; Consumers’ Use of the Internet

\(^{11}\) The Economist, 2003; Internet? No Thanks; September 20\(^{th}\) 2003, p.43
9.2.3 Building home access

Based on this evidence we conclude that public access in itself will make probably only a limited contribution to tackling the Digital Divide. We therefore recommend that:

- The focus for UK online centres should be on the areas where the programme has succeeded so far:
  - Promoting interest in using the Internet;
  - Introducing people to learning; and
  - Helping people develop the initial confidence and skills to do both.
- New initiatives to promote home access and make it easier to achieve should be introduced alongside UK online centres.

9.3 The role of the Community and Voluntary sector

9.3.1 More effective at targeting excluded groups

The Community and Voluntary sector centres claim to be more effective in reaching more excluded groups - the first PAT 15 report recognised this and as a result around 45% of all funded UK online centres were led by the sector.

Our evidence supports this claim of greater ‘reach’. These centres attract a greater proportion of people from the target groups, appear to attract people who are more excluded and make more use of volunteers (see section 8.8.3 above).

Hellawell highlights the importance of:

- Balancing formal and informal learning opportunities;
- Using peer-led training and support to motivate people; and
- Developing relevant, need-focused content.

But she comments "Unfortunately it is still the case that most public access is delivered by educational bodies that are more familiar with formal, classroom based, qualification-led learning."

We visited over 100 centres, most of which provided the type of opportunities Hellawell recommends. College and Local Authority centres often did this very successfully, but community-based centres were most consistent in meeting these principles. These qualitative impressions, combined with our quantitative data, provide persuasive evidence that the Community and Voluntary sectors can play an important role in introducing people to ICT and to learning in general.

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12 Department of Trade and Industry, 2000; Closing the Digital Divide: Information and Communication Technologies in Deprived Areas, a report by Social Exclusion Unit Policy Action Team 15

13 Hellawell, 2002; People First: meeting the needs of socially excluded customers
9.3.2 Future challenges

As the initiative moves to become more mainstream there is a danger that this contribution will be lost. To a certain extent this relates to funding (see below). But the unique advantages of the Community and Voluntary sector may be lost within a more formal framework. For example introducing quality frameworks and more standard approaches may be contrary to the working ethos of many Community and Voluntary sector centres we visited.

A further element in the success of these centres is the support they receive. Whereas FE, libraries and Local Authorities have existing support and management structures, these are often absent in the Community and Voluntary sectors. We did not assess the effectiveness of the various support mechanisms, but we received considerable informal positive feedback on:

- Direct Support – a service funded by DfES to support this sector; and
- The many community and FE college partnerships where the college worked with one or often many community centres to build on the strengths of both agencies.

9.3.3 Maintaining the sector’s involvement

Assuming that the UK online centre initiative continues to prioritise engaging new ICT users and learners, we recommend that:

- Maintaining the Community and Voluntary sector involvement as UK online promoters should be recognised as a key policy goal.
- Any quality frameworks and standard approaches should draw from the most successful practice in UK online centres, that is from the Community and Voluntary sector centres. Existing quality frameworks and standard approaches developed for more advanced learning should not be used as a starting point.
- FE College and community centre partnerships are encouraged.
- Sector specific support mechanisms are put in place or extended.

9.4 Sustainability and charging for services

9.4.1 Sustaining a unique service

As the pump-priming and short-term funding sources that set up the UK online centres expire, so the new funding sources will decide what centres do. But no other existing funding sources are well suited to keep the unique focus of UK online centres.

Their success at attracting ‘non-learners’ and helping people to progress is clear. Our visits to centres confirm users’ and managers’ reports that the individualised, informal approach and location in the community are key to this success. In almost every centre we visited, users told us that they were there because:

"It isn’t like a college.” (Users in college run centres told us this too!)
9.4.2 Limited funding options

So continuing this successful approach is important, not just keeping the physical presence. Centres may be encouraged to broaden their remit and deliver a wider range of services likely to attract funding. This will mean some combination of the following.

- Charging for Internet access – only 7% charged the target groups and our impression from discussion with users and managers is that this would deter the key target groups.
- Delivering funded learning – this is a key element of many UK online centres activity and will continue to be so. But unit funding and programmed course funding (including most EU funding) does not often cover the incremental, informal steps that we have seen in many UK online centres.
- Trust and charitable funding is clearly an option but is unlikely to be available at the scale needed to preserve 3,000 centres.
- Social Enterprise – while some projects may have secured their future as social enterprises, it is difficult to see how this can be a major route for most centres. Any enterprise depends on payment by willing customers, and the target groups of UK online centres have little disposable income to pay for these services.
- Regeneration funding – many projects use SRB, New Deal for Communities and similar funding. This will be an important source of continuing funding too.

9.4.3 Possible decline of services to excluded groups

Our survey data (see Figure 6-3 above) suggests that centre managers expect that there will be a gradual shift away from providing access and outreach activities towards higher-level courses and improved service quality.

In our interviews with the Community based projects that had additional revenue funding (see chapter 8 above), many projects felt the type and standard of their service was in danger of declining or becoming more oriented towards easier targets. So while projects might be ‘sustainable’ as an entity, certain parts of the service might not be. Projects repeatedly identified the potential for moving away from hard to reach groups towards ‘easier’ target groups. Projects felt they might need to do this to ensure they achieved outputs.

The funding climate has changed significantly during the life of UK online centres and since our main research period ended. The development of the LSC was the most significant change. Further changes are likely and in particular Skills Strategy ‘21st Century Skills – Realising our Potential’ includes commitments to be driven through LSCs to:

- Expand the Adult Basic Skills campaign and make ICT the third essential skill for life; and
- Guarantee the protection for leisure learning (particularly for pensioners and those on low incomes).
These changes mean that any historical analysis of funding issues may not be relevant. Nevertheless it seems likely that an absence of any replacement of CMF and NOF funding will lead to UK online centres becoming less effective at engaging the 'hard to reach' groups. They may lose their high success in helping new learners make the first steps back into learning.

9.4.4 Continuing the service not just the centres

We therefore recommend:

- That the continued success of UK online centres in reaching the more excluded groups and helping them to progress is carefully monitored.
- That links between UK online centres and Regeneration initiatives are expanded and encouraged.
- That whatever the future funding regime, additional funding is targeted on the successful informal services that many UK online centres have developed to attract excluded groups and those not involved in learning. For reasons identified earlier this should be targeted on the Community and Voluntary sector and on partnerships between this sector and others.

9.5 Progressing to learning

Our research was limited in following most users only for 6 to 9 months after they first used centres, and because most centres were in the early stages of their development. We know from our discussions with users that this timescale is often too short to follow the incremental progression a non-learner makes from not learning to starting a formal course.

Nevertheless we have evidence (see chapter 4) that combines to suggest that UK online centres:

- Are good at engaging new learners;
- Are good at developing confidence learners need to learn new topics;
- Can help people to progress to learndirect and higher-level courses; and
- Are more successful in achieving progression when they provide advice on how to do this.

The success in engaging learners appears to us to be founded on the very informal and open approach that most UK online centres take. They provide and non-threatening environment for people to take the first steps into learning. While it is clear that many centres would benefit from access to high quality learning materials, we are concerned that a more formal process or tasters and incremental courses in the early stages might disrupt this success.

But at the same time many centres may not be providing the best routes to progress once they have engaged the new learners and helped them develop their confidence. Where centres provide active support and advice they have greater success in helping users progress.
We therefore recommend:

- That the current informal approach to engaging learners is maintained and not replaced by any mandatory standardised taster programme;

- That all centres develop strong links with FE colleges and ensure that they can provide advice on learning progression (many such partnerships already exist);

- That high quality learning material for taster and incrementally progressive courses is developed (or identified) in a flexible format and provided for optional use by centres; and

- Where necessary stronger links are developed between UK online centres and learndirect centres to develop progression routes (again many such links already exist).

9.6 Maintaining the wider benefits of UK online centres

We have described the various wider community benefits of UK online centres for individuals in section 5.5 above. These are key to the character and success of many centres. The focus on helping people to make social contact, improve communication in families, help with homework and so on were all important to the users and managers we met. They contribute to the wider impact of centres on engaging new learners and developing confidence. Beyond these individual impacts, many community-based projects provide improved services across all their activity because of the interest and opportunities their UK online centre provides.

We recommend that any decisions on the future of UK online centres take into account these less tangible and broader factors.

9.7 Monitoring and management information

Many centre managers complained of heavy reporting requirements. The differing demands of ESF, LSC, SRB, CMF, NOF, and others often had to be met by individual centres. Some changes such as co-financing for EF will improve this. But heavy reporting demands remain a feature of many UK online centres’ funding.

At the same time we found it difficult to obtain accurate and useful monitoring data, for example on:

- Basic contact details for centres (rather than projects), because the central database was not up to date;

- The numbers of users in the digitally excluded target groups because centres did not ask for this information; and

- Progression, because most centres did not carry out any type of follow up survey.
As the programme has progressed, centres and projects have begun to develop effective tracking and management information systems. Few of these were in place when we visited projects so we cannot recommend any particular approach. We did visit project with a simple registration form and sign in book that were able to track their users – others had more sophisticated IT based systems. We suspect that the technology is less important than choosing a few key pieces of data to collect and then putting in place a simple system to do this consistently.

We recommend that all centres should collect as little data as possible, but to include:

- From the centre staff:
  - centre contact details
  - actual centre opening hours
- From users by entry form:
  - basic details of users (age, gender, ethnic group, any disability)
  - users existing access to the internet
  - users starting ICT skill level
  - users last leaning experience
- From users by follow up survey
  - users views on the centre
  - progress with learning and jobs
Appendix - Context and other research

What is the digital divide?

The ‘digital divide’ is the term that the Government and other agencies use to describe inequalities in access to and use of Information and Communication Technology (ICT). Reducing the gap is necessary to ensure that: ‘the gap between the haves and have-nots does not widen as ICT becomes increasingly influential in relation to educational standards, economic competitiveness and citizenship14.’

As ICT becomes more and more part of every day life, opportunities for formal and informal learning increasingly rely on some ICT access and capability. The government has described ICT as being the ‘indispensable grammar of modern life’.15

Most employers now see basic computing skills as more or less an entry-level requirement. In 2001 half of all adults said that computers were essential to their job16.

Social Inclusion and Citizenship

The role of ICT in citizenship and participation is perhaps less clear-cut than the other two aspects. The assumption is that lack of access to the Internet and other electronic forms of media entrenches existing social and economic divisions. But this is perhaps a crude way of looking at a much more complex issue. This assumes that:

- Those who do have access to ICT will use it for activities which promote or strengthen social cohesion;
- Access to ICT will in some way help people to overcome existing forms of social and economic exclusion.

In broad terms, equality of access to ICT will at least give excluded individuals the opportunity to take advantage of the same services and resources as other groups. But ensuring that everyone has access to the same level of technology is only the starting point in bridging the divide.

Features of the digital divide

In 2001 a DfES research project found that the proportion of people excluded through the digital divide ranged from 20% in more affluent areas to more than half of the working age population in more disadvantaged areas17. Research suggests that even by 2005, there will

14 BECTA, 2001; The ‘Digital Divide’: A discussion paper
15 DFEE, 2000; Bridging the digital divide, Michael Wills MP
16 DfES, 2002; Trends in ICT access and use, Research report 358
17 Hall Aitken, 2001; Mapping the Digital Divide
still be 40% of homes without Internet access\(^\text{18}\) and a recent study found that 41% of over 14s in Britain do not use the Internet\(^\text{19}\)

Those without Internet access are generally those in groups that are disadvantaged in other respects. Commentators identify several excluded groups on the wrong side of the digital divide, including:

- Low income groups: those in the highest income bands are seven times more likely to have home Internet access than those in the lowest\(^\text{20}\);
- Those in lower socio-economic groups: those in category AB are more than three times more likely to have home access than DE members\(^\text{21}\);
- Women: are less likely to have accessed the Internet, 51% compared to 57% of men, although this gap is narrowing\(^\text{22}\);
- Unemployed people: more than twice as many employed people are online than unemployed\(^\text{23}\);
- Older people: the home Internet access rate for over 65s is half of the overall rate\(^\text{24}\);
- Ethnic minorities: access to ICT varies among different ethnic groups depending on language and cultural barriers\(^\text{25}\);
- Those with disabilities: computer use and Internet access are lower among disabled groups.

Traditionally commentators measure the ‘Digital Divide’ in terms of ownership of equipment and access to technology. But both of these measures have weaknesses. Measuring household ownership of equipment does not guarantee that all members of the household can use it.\(^\text{26}\) Equally using ICT is not a guarantee of overcoming the digital divide in itself.

The nature of use is affected by several barriers:

- Wider social barriers (for example childcare commitments and substance abuse).


\(^{19}\) Oxford Internet Institute, 2003; quoted in: The Economist; ‘Internet? No Thanks’, September 20\(^\text{th}\) 2003; p. 43

\(^{20}\) OfTEL; 2003, consumers’ use of the Internet Q12

\(^{21}\) OfTEL; 2003, ib id

\(^{22}\) ONS, 2003, National Statistics Omnibus Survey

\(^{23}\) Booz-Allen & Hamilton, 2000

\(^{24}\) OfTEL; 2003 ib id

\(^{25}\) Owen et al; 2003; The use of and attitudes towards Information and Communication Technologies by people from Black and Minority Ethnic Groups living in deprived areas; DFES Research Report RR450

\(^{26}\) BECTA, 2001; The ‘Digital Divide’: A discussion paper
Motivation: this is often the biggest barrier to overcome. More than half of non-users are not interested or do not want to use the Internet. 

Lack of access and support: 39% of all non-users lack the knowledge or confidence to use the Internet.

Relevant content: there is ‘almost complete absence of relevant content for people who are experiencing some form of exclusion. Driven by the market, the Internet is full of content aimed at affluent consumers.’

Literacy: most material is designed for those with at least average levels of literacy.

Language and cultural barriers: there is little content that is not in English language. And there may be issues for Muslim women taking up mixed-sex learning opportunities.

And the quality of use is governed by:

- The type of technology and software;
- Speed of connection;
- Age of equipment; and
- The level of support and guidance.

So commentators now look more towards qualitative aspects of ICT use, as opposed to the basic measures of ownership and access. Specifically issues of whether those using ICT:

- Progress to further learning;
- Improve their employability skills;
- Make use of online services, or
- Engage more in their local Community.

‘Digital Divides’ involve a complex web of interconnected social, economic and cultural factors that cannot be fully captured by a definition that focuses solely on access or ownership... Clearer definitions and measurement criteria are needed in order to assess the effectiveness of policies and initiatives. BECTA, 2001

Much of the public ICT access being supported is still focused on formal learning contexts. Critics highlight the failure to focus ICT access effectively in locations that people use, and in formats that they are comfortable with. Many people using ICT facilities seek support and motivation than simple access or gaining a qualification.

The role of FE colleges in local provision often leads to traditional qualification led learning methods. And many commentators blame output-driven funding sources for limiting the

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27 ONS, First Release: Internet Access, September 2003,

28 ONS, First Release: Internet Access, September 2003

29 Hellawell S, 2001; Beyond Access: ICT and Social Inclusion

30 Hellawell S, 2002; People First: meeting the ICT needs of socially excluded customers
range of ICT provision. It is easier to monitor the outcomes of qualification based courses rather than, say, bite-sized introductory sessions. Hellawell\textsuperscript{31} highlights the importance of:

- Balancing formal and informal learning opportunities;
- Using peer-led training and support to motivate people;
- Developing relevant, need-focused content.

*Unfortunately it is still the case that most public access is delivered by educational bodies that are more familiar with formal, classroom based, qualification-led learning.*

Hellawell, 2002

**Summarising the divide**

One useful approach to describing the digital divide is to classify different groups based on awareness, need and motivation rather than specific socio-economic characteristics. Figure 0-1 shows one example of this approach, based on research carried out in Sunderland\textsuperscript{32}.

**Figure 0-1 A segmented approach to the digital divide based on need**

<table>
<thead>
<tr>
<th>GROUP</th>
<th>CHARACTERISTICS</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Unaware and probably unmotivated</td>
<td>Requiring clear information, education and motivation to find out more – ideally from a peer group or community member. While much emphasis is placed on community learning and community approaches, this group consists of individuals, who will each need a highly targeted, individualistic approach explaining the benefits, such as face-to-face in non-threatening surroundings. Mainly disadvantaged, poorly educated people aged 20+.</td>
</tr>
<tr>
<td>2. Aware, but untrained/ no experience/ little wish to learn/frightened of the learning experience and ICT</td>
<td>Requiring reasons to break through their inhibitions and try a course where ICT has a subsidiary role. Again, need an individualistic approach to involvement, maximising the use of peers with relevant ICT experience. Probably includes disaffected young people and middle-aged people.</td>
</tr>
<tr>
<td>3. Aware and wanting to learn through pressure from children/ grandchildren wanting to communicate with family and friends living away from the area</td>
<td>Require access to equipment and support to help achieve their known aims. May accept a community approach, as the primary motivation is about the local provision of something they want. Likely to include more mature people.</td>
</tr>
</tbody>
</table>

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\textsuperscript{31} Hellawell, 2002; People First: meeting the needs of socially excluded customers

\textsuperscript{32} Smith, Holmes, Toon & Lees; Digital Divide - Sunderland, GONE, 2001
GROUP | CHARACTERISTICS
--- | ---
4. Aware and needing to learn through pressure from work or education – well motivated | Need access to equipment /distance learning and support out of hours
 | Likely to want tailored training aimed at meeting their specific goals effectively and clarity of offer (expectations, terms, qualifications, etc.)
 | Will include the employed and those in education
5a. Aware and with some experience and basic ICT skills | These two groups may be considered as one, although the exact content of their message will be different, to reflect their different skills base
5b. Aware and with significant experience and at least intermediary ICT skills | Require clear information on progression, and indications of the benefits of such progression – many people will be satisfied with basic level skills only
 | Probably want informal training designed to lead to qualifications

How has the situation changed?

Home Internet access

The rate of take-up of home Internet access increased at a rapid rate between 1999 and 2001. It grew most quickly in the early part of 2001, increasing by 10% in the space of six months. But as Figure 0-2 shows, since the latter half of 2001 the rate of home access has remained fairly constant at between 42% and 45%. This might suggest that this particular market is reaching saturation point.

At February 2003, more than half of all UK homes had PCs and 45% had an Internet connection. About one in ten households have a PC but no Internet access. Half of these households said they intend to get Internet access in the next twelve months, suggesting that home Internet access could rise to at least half of all homes.

Figure 0-2 Home PC and Internet Access in the UK 1999-2003

Source: OfTEL, 2003

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33 OfTEL, 2003, Consumers’ use of Internet, Q12, February 2003
But there is also a regional dimension to the rate of Internet connection. And this reflects wider socio-economic trends. Connection rates are highest in London and the South-East.

Government statistics suggest that only 12% of the lowest income decile has home Internet access compared with 86% of the highest earners\textsuperscript{34}.

Since May 2002, Oftel has looked at Internet connection in relation to the level of deprivation of the household. As Figure 0-3 shows, this information suggests the home access gap is narrowing between households in areas of higher deprivation and those in less deprived areas.

**Figure 0-3 Rate of Home Internet Connection by Deprivation Ranking**

![](chart Graph)  
Source: Oftel, 2002-2003

But there is no evidence of the gap narrowing between income and socio-economic groups. On the contrary, as Figure 0-4 shows, increases in take-up of home Internet have been among the C1 and AB groups. The rate of connection among the DE groupings has remained around the 20% level since 2001.

**Figure 0-4 Home Internet connection in the UK by socio-economic group**

![](chart Graph)  
Source: Oftel, 2001-2003

\textsuperscript{34} ONS, Internet Access First Release July 2003
Home use of the Internet

Nationally, almost half of adults using the Internet at home had ordered tickets, goods or services, and 40% had accessed educational information\(^{35}\). Nearly half of those who had used the Internet in the past 12 months had accessed a government or public authority website. The most popular Internet purchases were travel (54%), tickets for events (41%), books or magazines (40%) and music or CDs (38%)\(^{36}\).

Internet access outside the home

Only a small proportion of adults rely on non-domestic access to the Internet. And this has decreased from 13% of adults in August 2001 to 8% in November 2002\(^{37}\). Most people who use the Internet elsewhere do so at work or at someone else’s house. But the proportion of adults using the Internet at libraries has shown a recent upturn, with one in ten users having accessed the Internet at a public library over the first quarter of 2003\(^{38}\).

But alternative access points are most popular with those who also have Internet access at home. Multi-location Internet use was most common among:

- Homes with heavy Internet use
- More experienced home users (3 years or more connected)
- Those aged between 15 and 34
- Higher socio-economic groupings (AB)

The main reasons for accessing the Internet outside the home were work, study and convenience. Few people mentioned speed of connection or cost as reasons for using the Internet elsewhere.

We have looked at how home access and overall access rates have changed over recent years. Figure 0-5 shows the rate of change indexed against the rate at the start of 2000. It points out that the steep growth in home Internet access has not resulted in a similar rate of increase in overall access among adults. This suggests that most of those getting home access were already users, particularly during 2000. It also suggests that not all adults in Internet connected homes are users, and that children may provide the impetus for home connection. Other studies back this up by showing that households with children are more likely to have Internet access\(^{39}\) and that presence of children in the household influences level of interest and perceived need\(^{40}\).

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\(^{35}\) ONS; First Release: Internet Access, April 2003

\(^{36}\) ONS; First Release: Internet access, July 2003

\(^{37}\) OfTEL, 2001 – 2003; Consumers’ Use of the Internet

\(^{38}\) ONS, Internet Access First Release, July 2003

\(^{39}\) Hall Aitken, 2001, Mapping the Digital Divide

\(^{40}\) DfES, 2002; Trends in ICT access and use, Research report 358
Public ICT Sites

Cardiff University carried out a study into the use of public ICT sites, involving a large-scale household survey in the West of England and South Wales during the summer of 2002. The study found that just over a third of respondents reported having access to a public ICT site. Most of these cited libraries (28%), commercial sites (14%) and local education establishments (10%) as offering this access. Awareness of community centre locations was low at 5%, although a third lived in a ward, which had a community ICT site. Awareness of public ICT access was much higher among experienced users with five years plus ICT use. Just over half of this group were aware of public ICT sites.

The survey found that 11% of the sample made use of public ICT access. Most use was made of local educational establishments (5%) and libraries (4%) and only 3% used commercial sites and just 2% community sites.

The study highlights differences in patterns of public use, with older users more likely to use libraries and commercial sites. Younger users were most likely to use community sites. Not surprisingly, those in higher socio-economic groups were more likely to have ICT access at home or work, and less likely to use commercial services. Partly skilled respondents were three times more likely to use ICT at community sites. Again, experienced users were more likely to use public ICT sites, and 71% of the users of public sites had at least five years experience in using ICT.

Among those who had used a computer in the past year but had no access at home, community sites were the most commonly used form of public access. But as Figure 0-6

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41 Selwyn N, 2002; Widening access to ICT via public sites – a research report
shows, the workplace and friend’s and relative’s houses are the more common means of access.

Figure 0-6 Source of ICT access among users without access at home

Among those who had used a computer during the past year, those who had continued into post-compulsory education were twice as likely to have used a public ICT site than those who had not. Those who reported a long-term health problem or disability were also less likely to use a public site.

What’s stopping people using ICT?

The Office for National Statistics carries out a regular omnibus survey of adults in the UK. It asks whether people have ever accessed the Internet and reasons for non-use. In Figure 0-7 we have applied these proportions to the total number of adults not using the Internet. This gives us an idea of the changing nature and scale of digital exclusion.

Figure 0-7 Reasons for adults not using the Internet (Great Britain)

It shows there are clear decreases in the numbers citing:
Cost (down from 2M to 1M);
Lack of interest (down from 10M to 7.5M); and
No need (down from 4M to 2.5M).

But there is no real drop in two key groups:

Those stating they have no access: consistently 4.5M to 5.5M
Those stating they lack the necessary confidence or skills: remains at between 3.5M to 4.5M

This suggests that while government actions and market forces are making inroads into some groups; there is a hard-core of people lacking access and/ or skills that is not declining. As we highlighted earlier, lack of access is usually perceived rather than actual.

The Cardiff study asked those not using ICT for their main reason for not using it. The biggest single reason was a lack of interest or motivation, stated by a quarter of non-users42. Another major reason was a perceived lack of need (18%).

Only 15% mentioned lack of skills and 9% lack of access as their main barrier. And only 2% stated that cost was the main issue. So although 30% of respondents in the ONS omnibus mentioned access, it seems not to be the main reason for most people who do not use ICT. Comparing the two sets of findings; interest, motivation and perceived need are the most significant barriers to use.

Providing public Internet access can only go part of the way to addressing the digital divide by overcoming access, cost and skills barriers. But based on these findings, providing public ICT access can only at best address about a quarter of current non-users. And the biggest group of these will need support or training to overcome their current skills gap.

Figure 0-8 Main reason for not using ICT

<table>
<thead>
<tr>
<th>Reason</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>No interest/motivation</td>
<td>25%</td>
</tr>
<tr>
<td>Lack of skills</td>
<td>18%</td>
</tr>
<tr>
<td>No access</td>
<td>15%</td>
</tr>
<tr>
<td>No longer use in work</td>
<td>13%</td>
</tr>
<tr>
<td>Ill health</td>
<td>9%</td>
</tr>
<tr>
<td>No longer use in work</td>
<td>7%</td>
</tr>
<tr>
<td>No longer use in work</td>
<td>3%</td>
</tr>
<tr>
<td>No longer use in work</td>
<td>2%</td>
</tr>
<tr>
<td>No longer use in work</td>
<td>1%</td>
</tr>
</tbody>
</table>

42 Selwyn N, 2002; Widening access to ICT via public sites – a research report
This study also identified differences within certain groups. Women and those in the partly skilled or unpaid employment categories were more likely to state lack of skills or access as the key barrier to using ICT.

At least 74% of non-users of ICT...would be unaffected by access to ICT via public sites – at whatever level. Selwyn, 2002

Key issues

The focus for action to bridge the digital divide has been shifting away from learning and increasingly towards social inclusion and active citizenship. Inequalities in ICT access mirror wider socio-economic inequalities.

Evidence backs this up suggesting that unemployed, low-income groups, older people and women are still disadvantaged. But some of these gaps are narrowing more than others. It appears that age and income are the two most significant factors which underpin the divide.

The rate of increase in home Internet access is slowing down, suggesting that take-up may be reaching saturation point.

The steep increase in home access to the Internet since 1999 has not led to a significant increase in general adult access. This is probably because most households connecting were already Internet users taking advantage of the cheaper cost of home access.

Data and findings from several studies suggest that:

- Children often provide the impetus for home Internet access; and
- Many Internet connected households are likely to contain adults who do not use the Internet.

Improving access can only help to some extent in bridging the digital divide. By far the biggest barrier to accessing ICT is interest and motivation, followed by a lack of perceived need. Because of this, publicity, outreach and support need to be key elements in any digital inclusion strategy.

There appears to be no shortage of provision of ICT learning opportunities through formal and semi-formal routes. But most people do not use the Internet for education, but for:

- Communicating through e-mail;
- Surfing for leisure-related information; or
- Buying travel tickets and entertainment related goods.

One of the key issues highlighted in the Cardiff study of public ICT sites, was that they were often sited in schools, colleges and libraries. Selwyn queries whether these are truly located within communities. He concludes that 'the institutional barriers which prevented people from previously entering facilities such as a library or adult education centre, are unlikely to disappear merely because a site of ‘free’ ICT access has been located within them."

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43 Selwyn N, 2002; Widening access to ICT via public sites – a research report
Appendix - Evaluation method and interpretation

Evaluation design

DfES provided funding to projects, each of which comprised one or more centres. The centres within each project were, sometimes, very different. Our main brief was to consider the way users benefited from individual UK online centres, not the way that projects were managed. So we focused the evaluation on centres, rather than projects.

DfES considered and approved funding in three rounds:
- Summer 2000;
- Autumn 2000; and

We aimed to secure a representative sample of users from each of the three rounds and of successive cohorts of users from the early centres. We also aimed to secure sample sizes sufficient to allow us to compare difference between target groups.

In designing the sampling strategy we assumed that:
- centres would open within a few months of securing funding;
- most centres in round one would open before centres in round two and so on; and
- we could secure contact details including e-mail addresses for centres.

On this basis we designed an approach that involved:
- Contacting centres by post and e-mail to secure returns for a ‘Background Survey’ asking for:
  - Contact details;
  - Information on typology factors – opening times, users each quarter, sector leading the project, programming mix, type of location, type of service, region and any particular target groups; and
  - Help in managing the evaluation process.
- Selecting 10 centres from each of the 9 regions that would together provide 90 centres that were representative of all centres according to our typology data.
- Visiting these centres and liaising with them to ensure that managers asked all new users during a set period (around 3 months) to complete our new user questionnaire (see below).
- Selecting a further 180 centres where we would run the user survey through postal contact only.
- Using incentives (digital cameras and computers) as prize draw incentives to encourage respondents to the first survey to complete a postal follow up survey.
- A series of web based surveys to go to all centre managers.
- Longitudinal case studies with 21 centres chosen to be representative, not for any feature of their provision.
By summer 2002 the original timescale for centre opening had slipped by at least one year, but the evaluation timescale could not be extended. At this point we revised the evaluation programme. We also experienced great difficulty in securing valid contact data for centres.

We kept to the key principles of our sampling strategy but adjusted some plans to respond to practical constraints. In particular our plan for contacting users meant that we had not secured any user surveys from 3 Regions to that point. We have commented on these issues where relevant, in the following sections covering each aspect of the study method.

We have also analysed the monitoring data that centres submitted, via GOs, to DfES. Centres collected this data in various ways and only presented totals quarterly. Having reviewed data collection processes at several centres, we have concluded that we cannot view it as a definitive guide to the numbers or types of users. Equally our survey data may not be fully accurate. We have commented on these issues below.

Manager survey

By April 2002 we had Background Survey returns from 420 centres, out of 899 then open according to DfES. We used the e-mail contact details from these returns to send out a web-based survey in April 2002. After reminders we secured a 63% response rate to this survey. We used this survey for interim reporting and some limited data in this report.

In April 2003 we sent out a new survey to 888 centres using e-mail addresses and to 1,811 centres by post, both using DfES contact data. The response rate for this survey was 658 validated responses (24%). This survey provided the centre data for this final report.

Figure 0-9 shows that coverage of the second survey varied from around 48% of all centres in some regions to a minimum of just over 15% in one region. There is no general data to compare factors such as the typology data we gathered in our Background Survey. So we cannot make a firm assessment of the representativeness of this survey. If the 658 responses were a random sample then the results of the survey should be representative of all centre managers to better than +/-4% (at confidence level of 95%).

![Figure 0-9 Regional distribution of centres open by April 2003](source: DfES Monitoring Data, Quarter ending March 2003; Hall Aitken Background Surveys; HA Online Centre Manager Survey April 2003)
User survey structure

By June 2002 we had secured returns to our Background Survey from 652 centres of 1,528 then open. We selected centres for our user survey from these centres.

A large-scale user survey was the core of the study. It involved two questionnaires:

- an initial user survey, a short closed-question survey form, completed by users at the centre with centre staff support where necessary; and
- a follow up survey six to nine months later, posted directly to initial user survey respondents (who had agreed to take part) and with a prize draw incentive.

When we redesigned the evaluation to respond to delayed centre opening we added a second follow up survey for users in the first round, to gather longer-term output data.

At the point of completing the initial questionnaire, a third of respondents had been at the centre for more than 3 months (34%), but 17% had completed the questionnaire on their first day, shown in Figure 0-10 below.

![Figure 0-10 How long at centre at time of responding](image)

To make for easier reading, in the report we have referred to the various survey rounds as follows:

- ‘new users’ means respondents to the initial user survey;
- ‘after six months’ refers to the first follow up survey; and
- ‘after one year’ refers to the more limited second follow up survey.

User survey numbers and representativeness

We secured user survey returns from 283 out of 652 validated centres, or a 43% response rate for centres. The 283 centres were broadly representative of the 652 centres on the dimensions of our sampling frame, as shown in Figure 0-11 below. They were largely first and some second round centres. All our user survey data is about users who first came to centres up to September - October 2002.
## Comparison of Typology survey and initial user survey centres

<table>
<thead>
<tr>
<th>Centre Type</th>
<th>Typology survey</th>
<th>Initial user survey</th>
<th>Difference % points</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fixed only</td>
<td>49%</td>
<td>54%</td>
<td>+5%</td>
</tr>
<tr>
<td>Outreach only</td>
<td>4%</td>
<td>2%</td>
<td>-2%</td>
</tr>
<tr>
<td>Mobile only</td>
<td>2%</td>
<td>2%</td>
<td>0</td>
</tr>
<tr>
<td>Mixed</td>
<td>34%</td>
<td>33%</td>
<td>-1%</td>
</tr>
<tr>
<td>No response</td>
<td>10%</td>
<td>15%</td>
<td>+5%</td>
</tr>
<tr>
<td>Size of centre</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1-49 users</td>
<td>24%</td>
<td>21%</td>
<td>-3%</td>
</tr>
<tr>
<td>50-99 users</td>
<td>19%</td>
<td>20%</td>
<td>+1%</td>
</tr>
<tr>
<td>100-499 users</td>
<td>24%</td>
<td>33%</td>
<td>+9%</td>
</tr>
<tr>
<td>500-1499 users</td>
<td>4%</td>
<td>7%</td>
<td>+3%</td>
</tr>
<tr>
<td>1500+ users</td>
<td>2%</td>
<td>4%</td>
<td>+2%</td>
</tr>
<tr>
<td>No response</td>
<td>27%</td>
<td>16%</td>
<td>-11%</td>
</tr>
<tr>
<td>Programming mix</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Unstructured drop in only</td>
<td>9%</td>
<td>5%</td>
<td>-4%</td>
</tr>
<tr>
<td>Drop in for courses only</td>
<td>3%</td>
<td>2%</td>
<td>-1%</td>
</tr>
<tr>
<td>Programmed courses only</td>
<td>11%</td>
<td>10%</td>
<td>-1%</td>
</tr>
<tr>
<td>Drop in only for courses and access</td>
<td>8%</td>
<td>8%</td>
<td>0</td>
</tr>
<tr>
<td>Courses only - programmed and drop-in</td>
<td>8%</td>
<td>11%</td>
<td>+3%</td>
</tr>
<tr>
<td>Programmed course &amp; unstructured drop in</td>
<td>12%</td>
<td>13%</td>
<td>+1%</td>
</tr>
<tr>
<td>All three types</td>
<td>38%</td>
<td>43%</td>
<td>+5%</td>
</tr>
<tr>
<td>No response</td>
<td>12%</td>
<td>7%</td>
<td>-5%</td>
</tr>
<tr>
<td>Region</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>North-East</td>
<td>15%</td>
<td>14%</td>
<td>-1%</td>
</tr>
<tr>
<td>North-West</td>
<td>13%</td>
<td>11%</td>
<td>-2%</td>
</tr>
<tr>
<td>Yorkshire &amp; Humberside</td>
<td>9%</td>
<td>13%</td>
<td>+4%</td>
</tr>
<tr>
<td>East Midlands</td>
<td>14%</td>
<td>16%</td>
<td>+2%</td>
</tr>
<tr>
<td>West Midlands</td>
<td>9%</td>
<td>10%</td>
<td>+1%</td>
</tr>
<tr>
<td>East of England</td>
<td>7%</td>
<td>6%</td>
<td>-1%</td>
</tr>
<tr>
<td>South-West</td>
<td>17%</td>
<td>12%</td>
<td>-5%</td>
</tr>
<tr>
<td>Greater London</td>
<td>12%</td>
<td>11%</td>
<td>-1%</td>
</tr>
<tr>
<td>South-East</td>
<td>4%</td>
<td>8%</td>
<td>+4%</td>
</tr>
</tbody>
</table>

Source: Hall Aitken Typology survey, number of centres participating, n=652; Hall Aitken Initial User Survey, number of centres participating, n=283
We secured:

- 7,563 responses to the initial user survey gathered from October 2001 to November 2002;
- 1,861 responses to the first follow up survey gathered from April 2002 to June 2003; and
- 394 responses to the final follow up survey gathered from April 2003 to June 2003.

The responses came in several rounds, shown in Figure 0-12 below. The final round was a truncated survey, intended to secure response from the three Regions that had been slower in getting centres started and not participated in the user survey to that point.

### Figure 0-12 User survey rounds and response numbers

<table>
<thead>
<tr>
<th>Survey</th>
<th>Time period</th>
<th>Number of responses</th>
<th>Total responses</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Initial User Survey</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Round 1</td>
<td>Autumn 2001</td>
<td>1360</td>
<td></td>
</tr>
<tr>
<td>Round 2</td>
<td>Spring/Summer 2002</td>
<td>4469</td>
<td></td>
</tr>
<tr>
<td>Round 3</td>
<td>Autumn 2002</td>
<td>1734</td>
<td>7563</td>
</tr>
<tr>
<td><strong>First Follow Up</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Round 1</td>
<td>Spring 2002</td>
<td>466</td>
<td></td>
</tr>
<tr>
<td>Round 2</td>
<td>Autumn 2002</td>
<td>1395</td>
<td>1861</td>
</tr>
<tr>
<td><strong>Final Follow Up</strong></td>
<td>Autumn 2002</td>
<td>394</td>
<td>394</td>
</tr>
</tbody>
</table>

Source: All user surveys

If the responses were a random sample then 7,563 responses to the initial survey provides an accuracy of +/- 1.13% (at a 95% confidence level) when analysing overall responses. It also provides reasonable levels of accuracy for analysing different target groups, as detailed in Figure 0-13 below.

### Figure 0-13 Accuracy and precision with different target groups within Initial User Survey

<table>
<thead>
<tr>
<th>Target Group</th>
<th>Total IUS responses</th>
<th>±% Accuracy at 95% confidence</th>
</tr>
</thead>
<tbody>
<tr>
<td>People who need help with basic skills</td>
<td>1636</td>
<td>± 2.42%</td>
</tr>
<tr>
<td>Lone Parents</td>
<td>600</td>
<td>± 4.0%</td>
</tr>
<tr>
<td>People from ethnic minorities</td>
<td>987</td>
<td>± 3.12%</td>
</tr>
<tr>
<td>Unemployed people</td>
<td>1779</td>
<td>± 2.32%</td>
</tr>
<tr>
<td>People with disabilities</td>
<td>776</td>
<td>± 3.52%</td>
</tr>
<tr>
<td>People over 60 not involved in learning*</td>
<td>1083</td>
<td>± 2.98%</td>
</tr>
</tbody>
</table>

Source: Initial User Survey, n=7563 * In Autumn 2001, round 1, we asked for ages only. We have estimated by assuming the same proportion of users over 65 to users over 60 not in learning from returns in Spring/Summer 2002, round 2.
Checks with managers

To corroborate the results we sent centre managers a copy of the results from their centre (only for centres with at least 10 respondents). We asked them to confirm:

- the basic demographic data – age, gender and ethnicity;
- economic status;
- basic skills levels; and
- the number of new users.

Of the centre managers who responded, the correlation between their information and ours was close in most cases.

For example, from 17 centres, there were 465 returns from the third round of initial user surveys and according to the estimates of centre managers there were 751 new users in the period. So 62% of new users for these centres completed a survey form. In earlier rounds the return rate was up to 80%. Overall, managers said that the respondents were representative of their users in terms of membership of target groups. The highest average difference across all the demographic indicators for the 43 centres’ returns was 2%.

Based on survey response rates and centre manager returns, we conclude that the results from the user survey are reasonably representative.

Checks with DfES Monitoring data

We also compared the profile of our respondents with the DfES monitoring returns for the period, shown in Figure 0-14. There is a difference of 4.5 percentage points in the proportion of men and women completing the survey compared with the monitoring data (38.8% men compared with 43.3% men, respectively). There is also a variation in age profile with 27% of respondents to the user survey under 35 but almost 36% in the monitoring data.

There are some differences in economic status, including a higher percentage of employed completing the survey; this may be down to a difference in definition as we have included part-time workers. There are also lower numbers of those in education completing the survey, this again may be down to differences in definition – the survey only counts students that are full-time.

Overall the survey seems to be a fair representation of ethnic minorities with some small differences among some ethnic groups.

It may be reasonable to suppose that women and older people are more likely to complete questionnaires, and that the monitoring data is more accurate in this respect. But we have no definitive proof for this. We have therefore not adjusted the survey data to take account of these differences. Instead we have provided un-weighted results but we caution that there may be some bias towards women and older people in our survey.
Figure 0-14 Comparison of returns for Initial User Survey and DfES monitoring data for Oct-Dec 2002

<table>
<thead>
<tr>
<th></th>
<th>For all centres responding</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>User Survey</td>
<td>DfES MI</td>
</tr>
<tr>
<td><strong>Gender</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Male</td>
<td>38.8%</td>
<td>43.3%</td>
</tr>
<tr>
<td>Female</td>
<td>61.2%</td>
<td>56.7%</td>
</tr>
<tr>
<td><strong>Age breakdown</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>16-25</td>
<td>12.4%</td>
<td>16.8%</td>
</tr>
<tr>
<td>26-35</td>
<td>15.1%</td>
<td>19.1%</td>
</tr>
<tr>
<td>36-45</td>
<td>18.7%</td>
<td>19.1%</td>
</tr>
<tr>
<td>46-55</td>
<td>17.2%</td>
<td>15.9%</td>
</tr>
<tr>
<td>56-64</td>
<td>17.2%</td>
<td>14.6%</td>
</tr>
<tr>
<td>Over 65</td>
<td>19.4%</td>
<td>14.5%</td>
</tr>
<tr>
<td><strong>Ethnicity</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>White</td>
<td>79.8%</td>
<td>72.3%</td>
</tr>
<tr>
<td>Asian</td>
<td>5.0%</td>
<td>8.2%</td>
</tr>
<tr>
<td>Black</td>
<td>6.2%</td>
<td>7.2%</td>
</tr>
<tr>
<td>Chinese</td>
<td>0.9%</td>
<td>0.5%</td>
</tr>
<tr>
<td>Other</td>
<td>1.6%</td>
<td>3.4%</td>
</tr>
<tr>
<td>Preferred not to say/unknown</td>
<td>6.4%</td>
<td>8.4%</td>
</tr>
</tbody>
</table>


**Follow Up Survey**

We conducted the Follow Up Survey in four waves for respondents agreeing to take part sending out the survey according to the date that users completed the initial User Survey:

- April/May 2002
- October/November 2002
- January/February 2003
- March/April 2003

In total we received 1861 responses; a 25% response rate. This was less than the 45-50% response rate we had targeted and achieved with a similar group in our evaluation of the Pioneer and Pathfinder UK online centres. We used a series of follow up letters, incentives and help from centres managers to reach this level.

*If the responses were* a random sample, 1,861 responses to the follow up survey provides an accuracy of +/- 1.97% (at a 95% confidence level) when analysing overall responses. However the accuracy for analysing different target groups is much less robust than for the initial survey, as detailed in Figure 0-15 below.
Figure 0-15 Accuracy and precision for First Follow Up Survey sub-groups

<table>
<thead>
<tr>
<th>Target Group</th>
<th>Total Follow Up Survey responses</th>
<th>±% Accuracy at 95% confidence for analysis</th>
</tr>
</thead>
<tbody>
<tr>
<td>People who need help with basic skills</td>
<td>355</td>
<td>± 4.68%</td>
</tr>
<tr>
<td>Lone Parents</td>
<td>142</td>
<td>± 7.91%</td>
</tr>
<tr>
<td>People from ethnic minorities</td>
<td>171</td>
<td>± 7.14%</td>
</tr>
<tr>
<td>Unemployed people</td>
<td>382</td>
<td>± 4.47%</td>
</tr>
<tr>
<td>People with disabilities</td>
<td>236</td>
<td>± 5.96%</td>
</tr>
<tr>
<td>People over 60 not involved in learning *</td>
<td>347</td>
<td>± 4.75%</td>
</tr>
</tbody>
</table>

Source: First Follow Up survey, n=1861
* In the Autumn 2001 survey we used over 65’s as a proxy.

By target group, the Follow Up survey respondents are similar overall to the Initial User Survey respondents as shown in Figure 0-16. The greatest difference was in a better response from older users.

Figure 0-16 Similarity of Initial and First Follow Up user surveys

<table>
<thead>
<tr>
<th>Target Group/Demographic group</th>
<th>% of Initial User survey</th>
<th>% of First Follow up survey</th>
</tr>
</thead>
<tbody>
<tr>
<td>People who need help with basic skills</td>
<td>22%</td>
<td>19%</td>
</tr>
<tr>
<td>Lone Parents</td>
<td>8%</td>
<td>8%</td>
</tr>
<tr>
<td>People from ethnic minorities</td>
<td>13%</td>
<td>9%</td>
</tr>
<tr>
<td>Unemployed people</td>
<td>23%</td>
<td>21%</td>
</tr>
<tr>
<td>People with disabilities</td>
<td>10%</td>
<td>13%</td>
</tr>
<tr>
<td>People over 60 not involved in learning *</td>
<td>14%</td>
<td>19%</td>
</tr>
<tr>
<td>Male</td>
<td>39%</td>
<td>36%</td>
</tr>
<tr>
<td>Female</td>
<td>60%</td>
<td>62%</td>
</tr>
<tr>
<td>Under 16</td>
<td>3%</td>
<td>2%</td>
</tr>
<tr>
<td>16-24</td>
<td>12%</td>
<td>5%</td>
</tr>
<tr>
<td>25-34</td>
<td>15%</td>
<td>11%</td>
</tr>
<tr>
<td>35-44</td>
<td>18%</td>
<td>18%</td>
</tr>
<tr>
<td>45-54</td>
<td>16%</td>
<td>19%</td>
</tr>
<tr>
<td>55-59</td>
<td>7%</td>
<td>7%</td>
</tr>
<tr>
<td>60-64</td>
<td>10%</td>
<td>13%</td>
</tr>
<tr>
<td>65 &amp; over</td>
<td>19%</td>
<td>23%</td>
</tr>
</tbody>
</table>

Source: Initial User Survey, n=7563, First Follow up survey, n=1861 *See Figure 0-13 for an explanation.
Final Follow Up Survey

We conducted a Final Follow Up survey about learning and e-government with 394 responses. *If the responses were a random sample then 394 responses to the follow up survey provides an accuracy of +/- 5% (at a 95% confidence level) when analysing overall responses.* Figure 0-17 below shows the breakdown of responses by target group.

<table>
<thead>
<tr>
<th>Target Group</th>
<th>Total Follow Up Survey responses</th>
<th>±% Accuracy at 95% confidence</th>
</tr>
</thead>
<tbody>
<tr>
<td>People who need help with basic skills</td>
<td>37</td>
<td>± 15.36%</td>
</tr>
<tr>
<td>Lone Parents</td>
<td>29</td>
<td>± 17.54%</td>
</tr>
<tr>
<td>People from ethnic minorities</td>
<td>25</td>
<td>± 18.99%</td>
</tr>
<tr>
<td>Unemployed people</td>
<td>80</td>
<td>± 9.79%</td>
</tr>
<tr>
<td>People with disabilities</td>
<td>39</td>
<td>± 14.91%</td>
</tr>
<tr>
<td>People over 60 not involved in learning *</td>
<td>73</td>
<td>± 10.37%</td>
</tr>
</tbody>
</table>

Source: First Follow up survey *See Figure 0-13 for an explanation.

There was a greater variation between respondents to the Final Follow Up survey and those to the Initial User Survey, than between other surveys, as shown in Figure 0-18. People with basic skills problems and ethnic minorities were under-represented. Postal surveys might have been more difficult for them because of language and literacy issues. And many would no longer have been attending centres so they could not seek help from centre managers. There was also a significant bias towards older respondents.

<table>
<thead>
<tr>
<th>Target Group</th>
<th>% of Initial survey</th>
<th>% of Final survey</th>
</tr>
</thead>
<tbody>
<tr>
<td>People who need help with basic skills</td>
<td>22%</td>
<td>9%</td>
</tr>
<tr>
<td>Lone Parents</td>
<td>8%</td>
<td>7%</td>
</tr>
<tr>
<td>People from ethnic minorities</td>
<td>13%</td>
<td>6%</td>
</tr>
<tr>
<td>Unemployed people</td>
<td>23%</td>
<td>20%</td>
</tr>
<tr>
<td>People with disabilities</td>
<td>10%</td>
<td>10%</td>
</tr>
<tr>
<td>People over 60 not involved in learning *</td>
<td>14%</td>
<td>19%</td>
</tr>
<tr>
<td>Male</td>
<td>39%</td>
<td>38%</td>
</tr>
<tr>
<td>Female</td>
<td>60%</td>
<td>60%</td>
</tr>
<tr>
<td>Under 16</td>
<td>3%</td>
<td>1%</td>
</tr>
<tr>
<td>16-24</td>
<td>12%</td>
<td>5%</td>
</tr>
<tr>
<td>25-34</td>
<td>15%</td>
<td>10%</td>
</tr>
<tr>
<td>35-44</td>
<td>18%</td>
<td>11%</td>
</tr>
<tr>
<td>45-54</td>
<td>16%</td>
<td>22%</td>
</tr>
<tr>
<td>55-59</td>
<td>7%</td>
<td>12%</td>
</tr>
<tr>
<td>60-64</td>
<td>10%</td>
<td>10%</td>
</tr>
<tr>
<td>65 and over*</td>
<td>19%</td>
<td>28%</td>
</tr>
</tbody>
</table>

Source: Initial User Survey, n=7563, Final Follow up survey, n=394

*For Initial User Survey we took an estimate from the round 2 results. For the Final Follow Up we used over 65’s.*
9.7.1 Overall user survey representativeness

Figure 0-20 below shows the differences by target group and main demographic group of those completing the first follow up, final follow up in comparison to the initial user survey.

We have also analysed the differences in answers to questions between the target groups in the first survey. Where these are important we have commented on them in the report. For many answers the differences between demographic groups is small and in general weighted results would not give notable changes or would not provide significant differences between data sets where non exist without the weighting. Figure 0-19 below shows examples of weighted responses, indicating the minimal difference this would make.

Figure 0-19 Responses to follow up survey weighted by age

<table>
<thead>
<tr>
<th>Get a better job or promotion?</th>
<th>Unweighted</th>
<th>Weighted</th>
<th>Difference</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Number</td>
<td>%</td>
<td>Number</td>
</tr>
<tr>
<td>Yes a lot</td>
<td>64</td>
<td>3.5</td>
<td>78</td>
</tr>
<tr>
<td>Yes a fair amount</td>
<td>68</td>
<td>3.7</td>
<td>82</td>
</tr>
<tr>
<td>Yes a little</td>
<td>115</td>
<td>6.3</td>
<td>131</td>
</tr>
<tr>
<td>No</td>
<td>1320</td>
<td>72.7</td>
<td>1286</td>
</tr>
<tr>
<td>No Response</td>
<td>248</td>
<td>13.7</td>
<td>238</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>To improve your skills for work?</th>
<th>Unweighted</th>
<th>Weighted</th>
<th>Difference</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Number</td>
<td>%</td>
<td>Number</td>
</tr>
<tr>
<td>Yes a lot</td>
<td>315</td>
<td>17.4</td>
<td>362</td>
</tr>
<tr>
<td>Yes a fair amount</td>
<td>292</td>
<td>16.1</td>
<td>314</td>
</tr>
<tr>
<td>Yes a little</td>
<td>331</td>
<td>18.2</td>
<td>346</td>
</tr>
<tr>
<td>No</td>
<td>695</td>
<td>38.3</td>
<td>634</td>
</tr>
<tr>
<td>No Response</td>
<td>182</td>
<td>10.0</td>
<td>160</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Increase your confidence?</th>
<th>Unweighted</th>
<th>Weighted</th>
<th>Difference</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Number</td>
<td>%</td>
<td>Number</td>
</tr>
<tr>
<td>Yes a lot</td>
<td>541</td>
<td>29.8</td>
<td>563</td>
</tr>
<tr>
<td>Yes a fair amount</td>
<td>502</td>
<td>27.7</td>
<td>505</td>
</tr>
<tr>
<td>Yes a little</td>
<td>490</td>
<td>27.0</td>
<td>472</td>
</tr>
<tr>
<td>No</td>
<td>218</td>
<td>12.0</td>
<td>213</td>
</tr>
<tr>
<td>No Response</td>
<td>64</td>
<td>3.5</td>
<td>62</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Go on to more advanced computer courses?</th>
<th>Unweighted</th>
<th>Weighted</th>
<th>Difference</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Number</td>
<td>%</td>
<td>Number</td>
</tr>
<tr>
<td>Yes a lot</td>
<td>446</td>
<td>24.6</td>
<td>471</td>
</tr>
<tr>
<td>Yes a fair amount</td>
<td>344</td>
<td>19.0</td>
<td>344</td>
</tr>
<tr>
<td>Yes a little</td>
<td>379</td>
<td>20.9</td>
<td>365</td>
</tr>
<tr>
<td>No</td>
<td>503</td>
<td>27.7</td>
<td>499</td>
</tr>
<tr>
<td>No Response</td>
<td>143</td>
<td>7.9</td>
<td>135</td>
</tr>
</tbody>
</table>

In general we conclude that:

- The initial survey was reasonably representative of all users to June 2002;
- The first follow up survey is moderately representative but may be weighted a little towards older and away from younger users;
The final follow up survey is indicative only; and

Without definitive data on the users sub-groups, and since weighting results might distort findings, it is better to allow readers to make their own judgements on accuracy based on an appreciation of the survey constraints.

### Figure 0-20 Similarity of Initial, First Follow up and Final Follow up surveys

<table>
<thead>
<tr>
<th>Target Group/Demographic Group</th>
<th>% of Initial User survey</th>
<th>Change in profile from Initial User Survey</th>
</tr>
</thead>
<tbody>
<tr>
<td>People who need help with basic skills</td>
<td>22%</td>
<td>-3%</td>
</tr>
<tr>
<td>Lone Parents</td>
<td>8%</td>
<td>0%</td>
</tr>
<tr>
<td>People from ethnic minorities</td>
<td>13%</td>
<td>-4%</td>
</tr>
<tr>
<td>Unemployed people</td>
<td>23%</td>
<td>-3%</td>
</tr>
<tr>
<td>People with disabilities</td>
<td>10%</td>
<td>+2%</td>
</tr>
<tr>
<td>People over 60 not involved in learning *</td>
<td>14%</td>
<td>+4%</td>
</tr>
<tr>
<td>Male</td>
<td>39%</td>
<td>-3%</td>
</tr>
<tr>
<td>Female</td>
<td>60%</td>
<td>+2%</td>
</tr>
<tr>
<td>Under 16</td>
<td>3%</td>
<td>-1%</td>
</tr>
<tr>
<td>16-24</td>
<td>12%</td>
<td>-6%</td>
</tr>
<tr>
<td>25-34</td>
<td>15%</td>
<td>-3%</td>
</tr>
<tr>
<td>35-44</td>
<td>18%</td>
<td>0%</td>
</tr>
<tr>
<td>45-54</td>
<td>16%</td>
<td>+2%</td>
</tr>
<tr>
<td>55-59</td>
<td>7%</td>
<td>0%</td>
</tr>
<tr>
<td>60-64</td>
<td>10%</td>
<td>+3%</td>
</tr>
<tr>
<td>65 &amp; over</td>
<td>19%</td>
<td>+4%</td>
</tr>
</tbody>
</table>

Source: Initial User Survey, n=7563, First Follow up survey, n=1861, Final Follow up survey, n=394

We have provided full data for all our analysis in a separate electronic technical appendix. We can also supply raw data in the form of SPSS files on request.

**Case studies and visits to centres**

We completed 10 case studies based on centre manager interviews, reviews of competitor services, user interviews, user focus groups, and tracking of developments.

We also visited over 90 centres while arranging the user survey and studying good practice with the target groups. We held short discussions with staff and users (where possible) at each centre during these visits. We have drawn on this extensive experience of centres to explore and explain findings from the surveys.

We have provided a summary of all case studies in the electronic technical appendix.
Revenue projects evaluation method

In evaluating the 201 projects DfES provided with additional revenue funding we carried out:

- Initial telephone interviews with 57 projects that received the additional funding ('funded centres');
- Initial telephone interviews with 23 comparator projects that did not receive additional funding ('non-funded centres');
- Case studies with both types; and
- Follow-up interviews with 37 funded projects and 12 non-funded projects.

We also used information from:

- The Centre managers survey; and
- Desk research to provide funding costs for community-based UK online centres.

Estimated total number of users

We used the DfES monitoring returns as the basis to calculate the total number of users. We divided the total users by the number of centres returning forms to give the average users per centre. We then multiplied this figure by the total number of centres open to give us the estimated total number of new and repeat users (assuming those returning forms to be typical).

We subtracted the proportion of users aged under 16 to give us the number of adult users for each quarter. Between October 2001 and March 2003, under 16s represented 8.6% of all users.

To estimate the total number of new users over this whole period we assumed that all users were new at the outset. We then estimated reduced proportions of new users for the following two quarters, based on a growing proportion of repeat use across the programme. From October 2001, the monitoring returns provided us with the proportion of new users. This allowed us to calculate 468,581 new adult users from January 2001 to March 2003 as shown in Figure 0-21.

<table>
<thead>
<tr>
<th>Period</th>
<th>Adult Users</th>
<th>% New</th>
<th>New Users</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jan to Mar 2001</td>
<td>18292</td>
<td>100%</td>
<td>18292</td>
</tr>
<tr>
<td>Apr to Jun 2001</td>
<td>43136</td>
<td>85%*</td>
<td>36665</td>
</tr>
<tr>
<td>Jul to Sep 2001</td>
<td>30490</td>
<td>70%*</td>
<td>21343</td>
</tr>
<tr>
<td>Oct to Dec 2001</td>
<td>39087</td>
<td>56%</td>
<td>21888</td>
</tr>
<tr>
<td>Jan to Mar 2002</td>
<td>46151</td>
<td>56%</td>
<td>25845</td>
</tr>
<tr>
<td>Apr to Jun 2002</td>
<td>82014</td>
<td>61%</td>
<td>50029</td>
</tr>
<tr>
<td>Jul to Sep 2002</td>
<td>144815</td>
<td>54%</td>
<td>78318</td>
</tr>
<tr>
<td>Oct to Dec 2002</td>
<td>220631</td>
<td>43%</td>
<td>94420</td>
</tr>
<tr>
<td>Jan to Mar 2003</td>
<td>255054</td>
<td>48%</td>
<td>121781</td>
</tr>
<tr>
<td><strong>Total new users</strong></td>
<td><strong>468581</strong></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: DfES Monitoring returns Jan 2001 to March 2003
*proportion of new users estimated
We expected that monitoring returns might have overestimated user numbers. So as a cross-check we compared this data with user figures that centre managers had supplied to us for the same period. We competed this for a sample of 76 centres that we could directly compare. From this exercise we found that around 30% of centres overestimated user numbers in the DfES returns. The monitoring figures for those that differed resulted in total user numbers that were about 16% higher than the figures managers had confirmed to us for these centres. We therefore used these findings to weight the figure calculated in Figure 0-21 above. Figure 0-22 below shows these lower quarterly figures for new adult users totalling 394,804.

<table>
<thead>
<tr>
<th>Period</th>
<th>New Users Lower Estimate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jan to Mar 2001</td>
<td>15380</td>
</tr>
<tr>
<td>Apr to Jun 2001</td>
<td>30828</td>
</tr>
<tr>
<td>Jul to Sep 2001</td>
<td>17945</td>
</tr>
<tr>
<td>Oct to Dec 2001</td>
<td>18404</td>
</tr>
<tr>
<td>Jan to Mar 2002</td>
<td>21730</td>
</tr>
<tr>
<td>Apr to Jun 2002</td>
<td>42064</td>
</tr>
<tr>
<td>Jul to Sep 2002</td>
<td>65750</td>
</tr>
<tr>
<td>Oct to Dec 2002</td>
<td>79767</td>
</tr>
<tr>
<td>Jan to Mar 2003</td>
<td>102935</td>
</tr>
<tr>
<td><strong>Total new users</strong></td>
<td><strong>394804</strong></td>
</tr>
</tbody>
</table>

Because of the concerns over the accuracy of the data, we have used these two estimates to calculate ranges of impacts in the report.

We calculated the gender split from the DfES quarterly monitoring returns from October 2001 to March 2003. In calculating these proportions we have discounted those with unknown gender to provide data comparable over time.

For the net outcome calculations in Chapter 7 we took these overall estimates and then further reduced them to exclude the 26% of adults who we identify in that chapter as representing ‘leakage’. That is all those who claim to have had both Internet access and the confidence to use computers before coming to the centre.

When calculating these net figures we used survey results only for those individuals (so most proportions in Chapter 7 are higher than in the body of the report, which reports on all users).

**Conclusions and commentary on analysis**

Taking all elements of the survey design and operation into consideration we have concluded that our overall user survey results are reasonably robust and representative of the new users coming to the centres up to June 2002. Because:

- our overall user profile is similar to that of the DfES monitoring data;
the overall number of centres involved was 35% of validated centres open during the main parts of the survey;

the profile of participating centres was close to the best information we have on the profile of all centres; and

managers confirmed that the profile of respondents from their centres was close to the profile of all their users and that most new users at those centres completed a questionnaire.

Results from the follow-up survey are a little less robust than the first survey – with some bias towards older respondents. The second follow-up survey should be seen as indicative only.

But the number of users has grown substantially – with around 70% of all users to March 2003 using the centres after we completed our initial user surveys. So we can only comment authoritatively on the results from the centres running during our data-gathering period – amounting to around one-fifth of all centres.

To estimate overall impacts to March 2003, we have to assume that the remaining 2,500 centres were similar to earlier centres. Some evidence supports this:

- The proportion of all users in the six target groups from monitoring data to March 2003 is close (at 64%) to our survey of users starting before July 2002 (62%).
- Analysis of the monitoring data of the later opening centres compared to the earlier centres shows no significant changes in the age profile of users.

But there is also some evidence suggesting changes in the profile of users over time:

- The proportion of males using centres has steadily risen;
- The proportion of unemployed users has dropped while there has been an increase in the proportion of users with disabilities and from ethnic minorities; and
- According to monitoring data there was a large drop in users progressing to further learning from 37% in the first quarter of 2002 to 21% in the first quarter of 2003.

Data on the sectors sponsoring the centres and the nature of spend is not available for all centres so we cannot check successive rounds of centres for differences on these dimensions. We consider that both these factors could be important in comparing centre performance. Additionally, our survey data and case study visits show that centres do change over time – becoming more successful as they mature.

Considering this analysis and our extensive experience of visiting projects, we consider that the results of our research are broadly indicative of all users' experience at centres. Centre monitoring data bears this out.

But specific impacts such as numbers progressing to further learning and into employment are much less clear. We have provided indicative estimates of these in the final chapter, but they should be regarded with some caution without further evidence.