

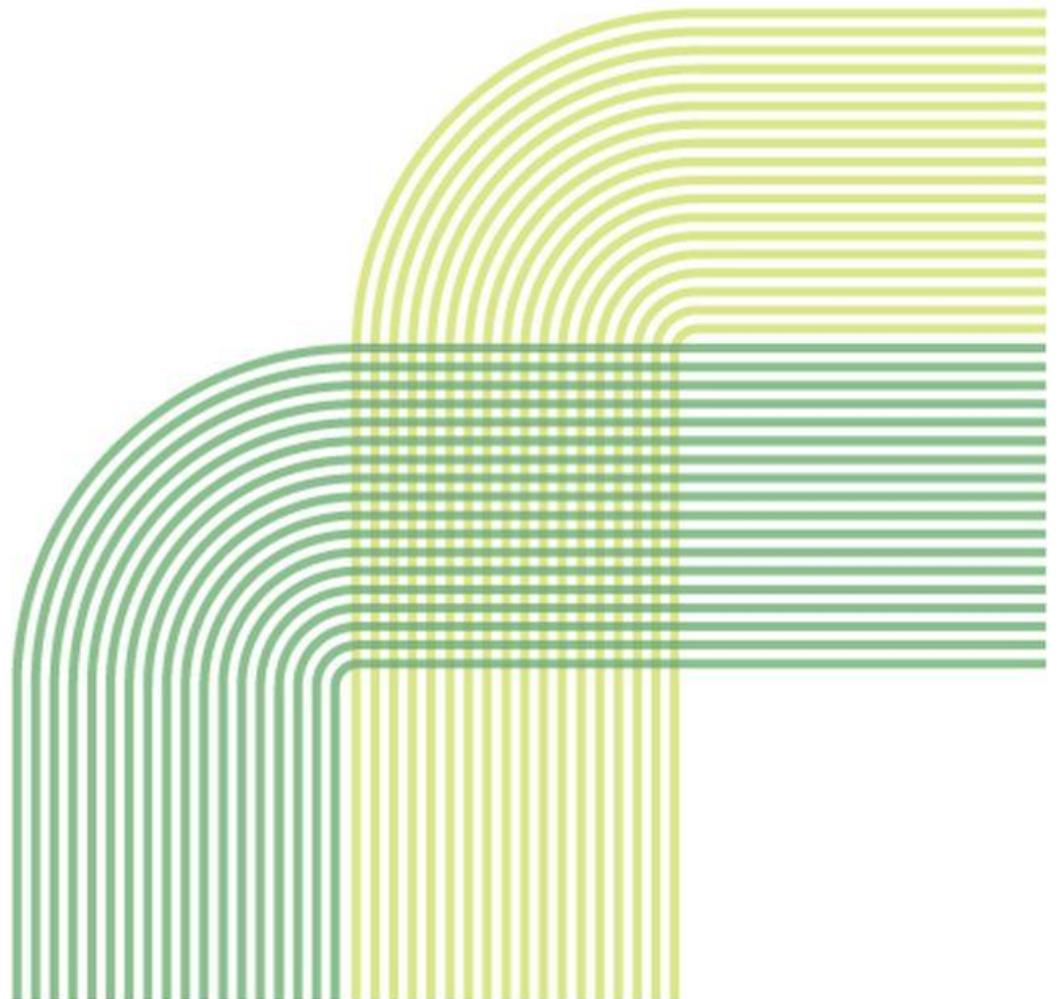


IFF Research

2012-2013 Annual Report

Prepared for UK Online centres
By IFF Research

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IFF Research

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1 Executive Summary

- 1.1 The high satisfaction levels we have seen in the past continued throughout 2012-13, with 88% feeling that the service offered by the UK online centre where they were doing their training was very good or excellent (and less than 1% feeling it was poor).
- 1.2 User advocacy was also high, with three fifths (59%) of Learners having already recommended UK online centres to another person by the time they were followed up for the Progression survey (although this was a slight drop from 63% in 2011-12).
- 1.3 There was an overall increase in Social Exclusion levels compared with 2011-12: eighty-five per cent of Learners met one or more of the Social Exclusion criteria in 2012-13, a greater proportion than in 2011-12 (when it was 79%).
- 1.4 This was partly driven by an increase in unemployed Learners (up from 34% to 47%), and Learners hearing about UK online via Jobcentre Plus (up from 21% to 33%). Reflecting this there were more learners giving work or job-search related reasons for signing up, for example 42% wanted to be able to search and apply for jobs online in 2012-13 compared with 34% in the previous year, and 38% wanted to get help or learn skills for writing their CV, compared with 30% previously.
- 1.5 UK online centres Learners are a mix of non, narrow and broad(er) users. The majority of users (85%) had have used a computer before registering; and while evidence from the Learners survey shows that this tended to be at a basic level only, a minority were already able to perform more complex tasks.
- 1.6 Once again, Learners confidence in using computers and / or the internet has increased since their registration: nine in ten (91%) were more confident about using a computer and 88% felt more confident when using the internet.
- 1.7 Only a very small minority had not used a computer (44 Learners – 3% of Learners) or the internet (88 Learners – 7% of Learners) since registering.
- 1.8 Encouragingly, the proportion of Learners experiencing ‘any positive outcome’ has increased from 91% in 2011-12 to 95% in 2012-13. This overall rise has been driven by increases in both ‘*Quality of Life*’, which includes Learners carrying out computer/internet related activities for the first time or more often, developing hobbies and interests or using government services online (91% compared with 85% in 2011-12), and ‘*Employment Progression*’, which includes Learners progression both in terms of finding work and experiencing improvements or developments within a job already held when completing the Learner survey (66% compared with 60% in 2011-12).
- 1.9 The increase in the ‘*Quality of Life*’ KPI, has been driven by an increase in the proportion using a government website or accessing their local authority’s services online (up from 69% to 76%). The increase in use of government websites has principally been driven by an increase in the proportion of Learners using Gov.uk / DirectGov (up from 48% to 58%) and JobCentrePlus’ online services (up from 33% to 42%).
- 1.10 Although the overall proportion of Learners experiencing ‘*Learning Progression*’ (having undertaken further learning since registering) at 35% is in line with 2011-12, the vast majority (91%) of Learners believe they will go on to further learning, and a greater proportion believe they definitely will, compared with 2011-2012 (up from 60% to 67%).



2 Introduction and Methodology

Overview and Research Aims

- 2.1 There are still an estimated 7.42 million people in the UK who have never used the internet¹. Significantly, those already at a social or financial disadvantage are more likely to be off-line, and missing out on the benefits digital technologies can provide.
- 2.2 Set up by government in 2000 to provide public access to computers, the UK online centres network plays a key role in exploiting ICT to help improve individual lives, strengthen communities and achieve social inclusion. Their goal is to help level the digital playing field and they are seen as a core part of government's vision for a networked nation. There are thousands of UK online centres across England, based in libraries, community centres, on high streets and buses, in care homes, social housing estates and faith groups. They work to engage people in their local communities, and to support them to take their first steps online.
- 2.3 UK online centres have been consulting with users of their services for a number of years with one of the main mechanisms being surveys of users of Learn my way (and previously 'GO ON' and 'myguide')², UK online centres' learning product, one shortly after registration and another one month later. These surveys enable UK online centres to monitor and to improve user satisfaction and to explore the impact that engaging with centres has on an individual (in terms of progression into employment or other learning or in terms of improved skills or confidence). It also provides important evidence for whether the UK online centres are delivering services to those individuals who most need it, namely those who are socially excluded.

Methodological Approach

- 2.4 The study consists of two parts:
 - An online 'Learner' survey amongst registered users of Learn my way or GO ON;
 - A telephone 'Progression' survey amongst users who opt in from the Learner survey conducted one month later to allow for progression activity.
- 2.5 Learners that register are invited by the UK online centre where they are doing their learning to take part in the Learner survey. The Learner survey provides UK online centres with timely data on customer satisfaction and profile, in particular assessing the level of socially excluded users.
- 2.6 Sample for the Progression survey is generated from respondents who complete the Learner survey and are willing to be re-contacted for further research (at least) one month later. The Progression survey enables UK online centres to better understand impact and outcomes: what Learners go on to do, whether they have progressed to employment or another learning activity and what impact their engagement with UK online centres has had on their skills and their confidence.
- 2.7 In total 7,061 Learner surveys were completed by people recently registered with Learn my way or GO ON and 1,270 Progression survey interviews were completed between April 2012 and March 2013. The tables overleaf show how this breaks down by month / quarter.

¹ Office for National Statistics, *Internet Access Quarterly Update, Q4 2012*, 13th February 2013

² At the beginning of September 2012 the 'GO ON' website was rebranded as 'Learn my way', hence this report refers to both 'GO ON' and 'Learn my way' Learners



Table 2.1: Learner survey completes

Month of registering	Total GO ON / Learn my way
April 2012	529
May 2012	723
June 2012	606
July 2012	680
August 2012	506
September 2012	515
October 2012	652
November 2012	542
December 2012	332
January 2013	540
February 2013	690
March 2013	711
Total	7,026

Table 2.2: Progression survey completes

Quarter	Months of registering	Total
Q5	March, April, May 2012	482
Q6	June, July, August 2012	280
Q7	September, October & November 2012	281
Q8	December 2012, January & February 2013	227
Total	March 2012 to February 2013	1,270

- 2.8 This report covers all Learner and Progression research conducted in this period and builds upon monthly (for the Learner survey) and quarterly reports (for the Progression survey). The report will draw comparisons between the 2011-12 survey and the 2012-13 survey, where significant differences exist.



3 Learner Survey

Headlines

- **An overall increase in Social Exclusion levels compared with 2011-12**
- **An increase in unemployed Learners, and Learners hearing about UK online via / being referred by Jobcentre Plus**
- **More Learners giving work or job-search related reasons for signing up**
- **Continuing high satisfaction levels across the year, despite some month-to-month fluctuations**

Introduction

- 3.1 This chapter will begin by looking at the profile of Learners who completed the online Learner Survey, and the extent to which they fall within the category of social exclusion. It will then go on to investigate the details of their learning, including their situation at the point of registration and reason for signing up. Finally, it will look at the three main Key Performance Indicators (KPIs) through which UK online centres measures Learner satisfaction.

Learner Profile

- 3.2 There were roughly equal numbers of male and female Learners throughout the year but overall 2012-13 saw slightly more females than males (52% vs. 48%), which was a change from the previous year (46% female vs. 54% male).
- 3.3 The age profile of Learners in 2012-13 was broadly similar to 2011-12, although there was a small increase in the youngest age group (the proportion of 16-24s rose from 7% to 9%) and a decrease in the proportion of over 65s (from 21% to 18%).
- 3.4 2012-13 saw a lower proportion of Black, Asian and Minority Ethnic (BAME) Learners than in 2011-12 (17% compared with 23%) and a corresponding increase in white British Learners (78% in 2012-13 compared to 71% in 2011-12).
- 3.5 The proportion of disabled Learners has risen from 26% in 2011-12 to 31% in 2012-13, while the proportion of Learners who do not consider themselves to have a disability has fallen from 62% to 58%.

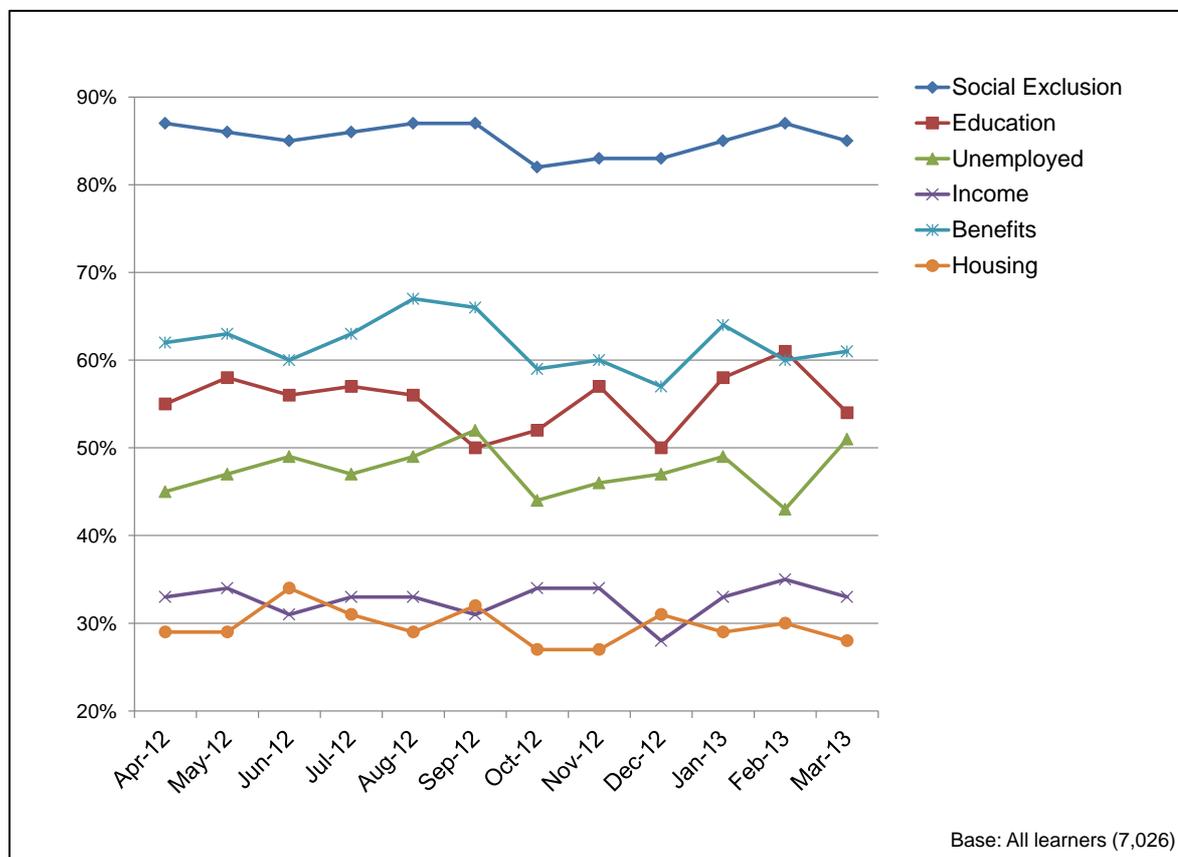
Social Exclusion

- 3.6 Measuring the proportion of Learners who meet one or more 'social exclusion' criteria allows UK online centres to monitor whether or not they are helping more vulnerable people learn about computers and the internet. These criteria are:
- **Education** – below Level 2
 - Being **Unemployed**
 - **Income** of below £10,000
 - Being in receipt of **benefits**
 - **Housing** – living in council, housing association, or sheltered accommodation, or having no current home

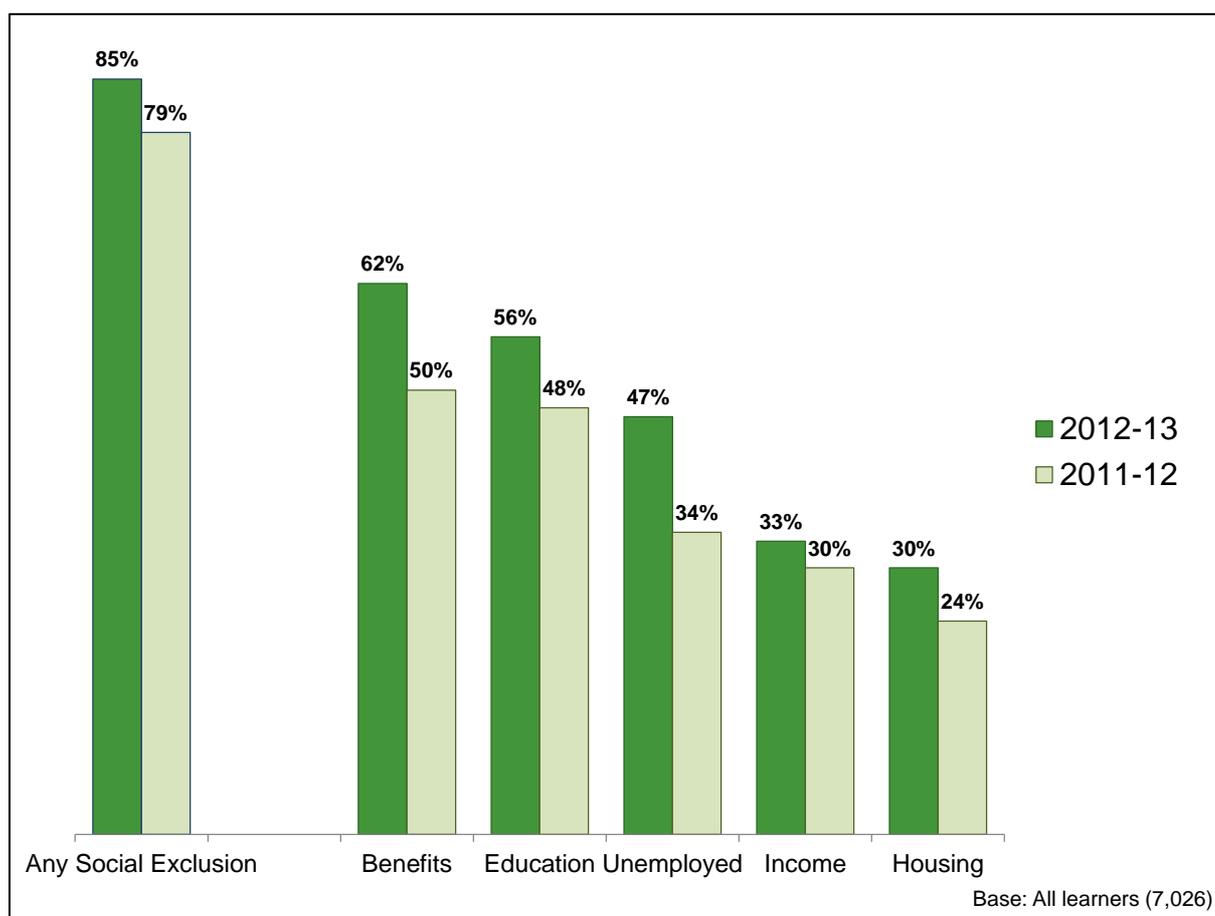


- 3.7 Eighty-five per cent of Learners met one or more of the Social Exclusion criteria in 2012-13, a greater proportion than in 2011-12 (when it was 79%). While the overall level of Social Exclusion remained fairly consistent throughout the year, the individual indicators were more prone to fluctuation.

Figure 3.1: Social Exclusion indicators over time



- 3.8 Across the year, three of the social exclusion indicators have seen large rises compared with 2011-12 levels:
- The proportion of unemployed Learners has increased from 34% to 47%
 - The proportion of Learners in receipt of benefits has increased from 50% to 62%
 - The proportion of Learners with education below level 2 has increased from 48% to 56%
- 3.9 There is some overlap between these criteria: two-thirds (67%) of Learners in receipt of benefits were unemployed (compared with 12% of Learners who were not in receipt of benefits). Level of education and unemployment are also associated to some degree: more than half (54%) of Learners with education below level 2 were unemployed (compared with 40% of Learners with education at level 2 or above).
- 3.10 There have also been increases (albeit smaller) in the proportions of Learners falling within the income and housing social exclusion indicators, as shown in Figure 3.2 overleaf.

Figure 3.2: Comparison of Social Exclusion measures with previous year

Prior Internet Use

- 3.11 Two-thirds (68%) of Learners had been on the internet before they started their learning with GO ON / Learn my way. Older Learners were less likely to have been online before (only 51% had been) as were Learners with no prior qualifications (55%).
- 3.12 Although the majority of Learners had been online before, this prior internet use was at a fairly basic level. At the time of registering, among those who had been online before:
- One-third (34%) described themselves as having little knowledge or understanding of the internet
 - And a similar proportion (32%) could do one or two simple things like email or using a search engine
 - Although three in ten (30%) could do a few more complicated things like using a social network site or making an online purchase
- 3.13 Of those who had been on the internet before, just under half (46%) stated that they had been using the internet for some time without help from anyone else, a similar proportion (44%) said that someone else was always on hand to help them if necessary, while 6% indicated that someone else had always controlled the computer for them.

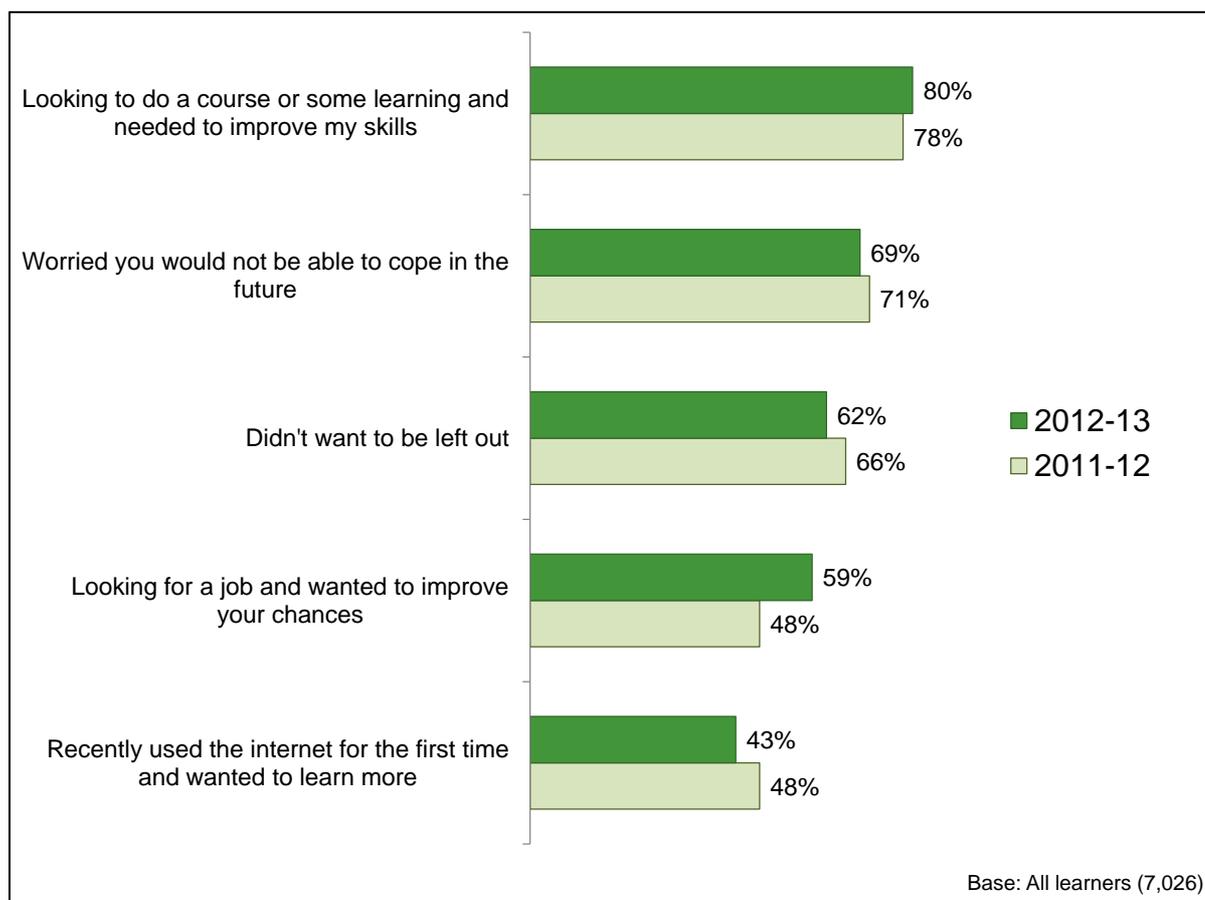
Where Learning Takes Place

- 3.14 The vast majority of Learners (86%) have done at least some of their learning at a UK online centre (80% exclusively at a centre, and 7% at a centre and elsewhere). The remaining 14% have done all their learning outside of a UK online centre.
- 3.15 Of those who did all or some of their learning outside of a UK online centre, half (50%) did so at home – a decrease from 62% of Learners in 2011-12. Other places where these Learners have accessed GO ON / Learn my way include:
- In a (non-UK online) learning or training centre (28%) – an increase on 22% in 2011-12
 - In a local library (19%)
 - In a community centre (14%)
 - At work (8%)
 - At a friend or relative's house (5%)
 - At a college (5%)

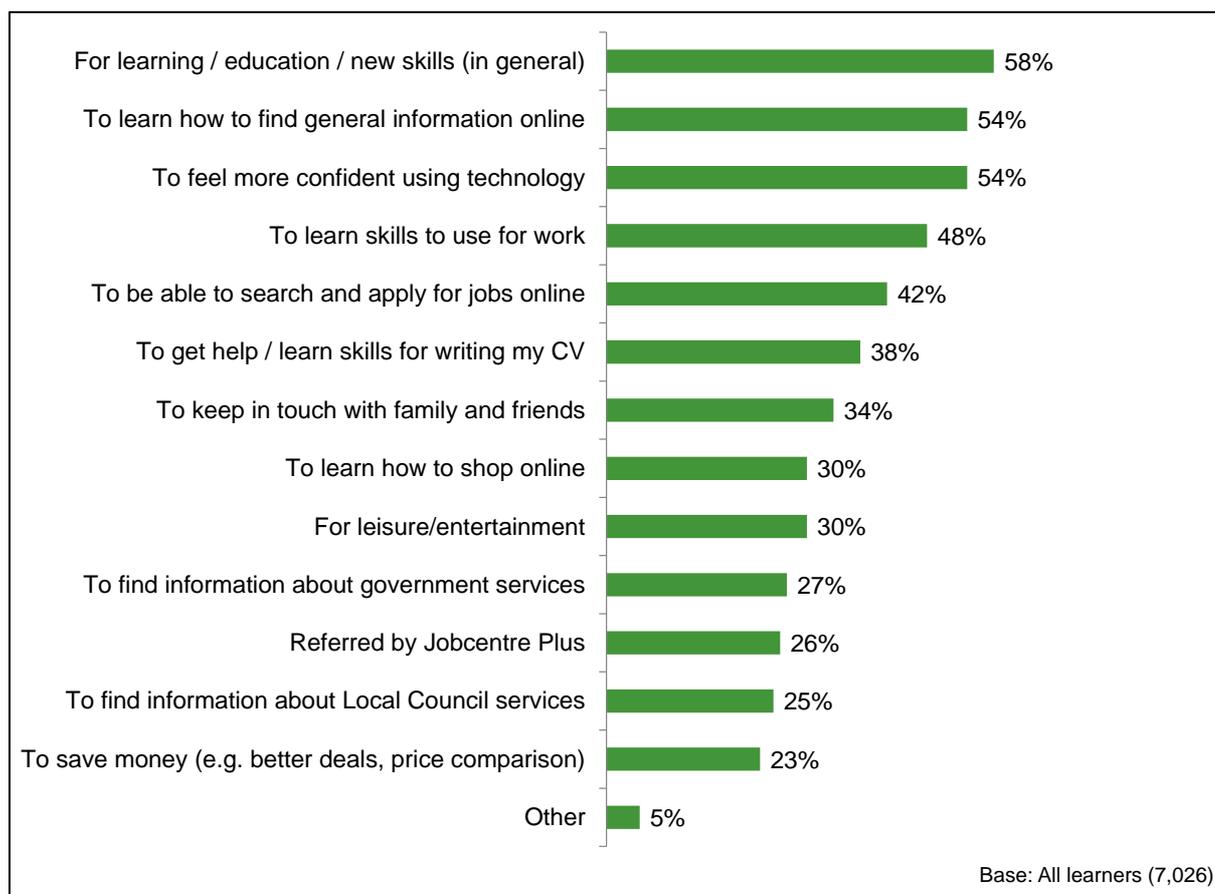
Learner situation and motivations

- 3.16 Learners first heard about GO ON / Learn my way and UK online centres from a wide range of sources. This year, the proportion of Learners mentioning Jobcentre Plus has seen a big increase, rising to 33% from 21% in 2011-12 (This accompanies the above mentioned increase in proportion of unemployed Learners). At the same time there has been a decrease in the proportion of Learners who mentioned hearing about UK online centres from a family member or friend – 20% in 2012-13 compared with 26% in the previous year.
- 3.17 Other commonly mentioned sources include:
- A community organisation (16%)
 - Library (14%)
- 3.18 As shown in Figure 3.3 overleaf, the situations of Learners at the time of registering with UK online centres in 2012-13 are mainly in line with 2011-12. Once again, four-fifths (80%) of Learners were looking to do a course or some learning for which they needed to improve their skills. However, three-fifths (59%) of Learners were looking for a job and wanted to improve their chances, an increase on just under half (48%) of Learners in the previous year. This shows that UK online continues to be seen as a valuable way for people to progress into further learning, while it is helping an increasing number of people looking to progress into work.



Figure 3.3: Learner situation at time of registering

- 3.19 Over two-thirds (69%) of Learners stated that they were worried they would not be able to cope in the future without internet skills, while just over three-fifths (62%) of Learners didn't want to be left out of people's increasing use of the internet. These reasons were most prevalent among older people, being mentioned by 83% and 80% respectively of Learners aged 65+. These figures are significant in terms of UK online centre's purpose of using ICT to help improve individual lives, strengthen communities and achieve social inclusion.
- 3.20 More than two-fifths of Learners (43%) stated that they had recently used the internet for the first time and wanted to learn more – a positive sign that UK online are continuing to provide a vital service to the digitally excluded population.
- 3.21 At the time of registering or signing up, Learners tended to be looking to improve their general computer or internet skills (75%) rather than to learn skills for a specific purpose (20%). The likelihood of looking to improve general (rather than specific) skills increases with Learners' age – 89% of Learners aged 65+ were looking to improve their skills generally, compared with 46% of Learners aged 16-24 and 63% of Learners aged 25-34.
- 3.22 Figure 3.4 shows Learners' more specific reasons for registering with UK online.

Figure 3.4: Reasons for registering

3.23 The most commonly given reasons for signing up or registering with UK online centres in 2012-13 were:

- To learn new skills generally (58%)
- To learn how to find general information online (54%)
- To feel more confident using technology (54%)

3.24 Compared with 2011-12, a greater proportion gave the reason that they were directly referred by Jobcentre Plus – 26%, up from 16% (corresponding with the above mentioned increases in the proportions of Learners who heard about UK online centres from Jobcentre Plus, and unemployed Learners). Alongside this, the proportions giving job search related reasons also increased – 42% wanted to be able to search and apply for jobs online compared with 34% in the previous year, and 38% wanted to get help or learn skills for writing their CV, compared with 30% previously.

3.25 Across the year, unemployed and BAME Learners were more likely to give work related reasons for registering:

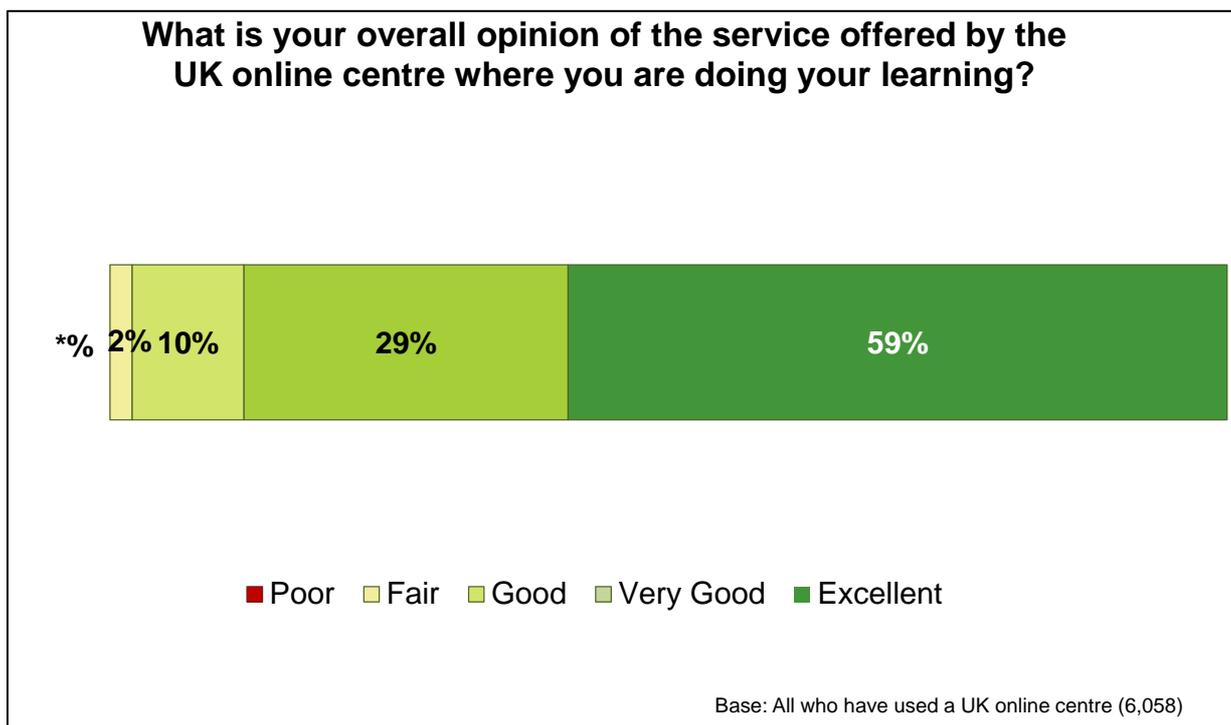
- To learn skills to use for work: 63% of unemployed Learners and 59% of BAME Learners (compared with 48% average)
- To be able to search and apply for jobs online: 61% of unemployed Learners and 50% of BAME Learners (compared with 42% average)
- To get help / learn skills for writing my CV: 53% of unemployed Learners and 49% of BAME Learners (compared with 38% average)



Satisfaction with UK online and Key Performance Indicators (KPIs)

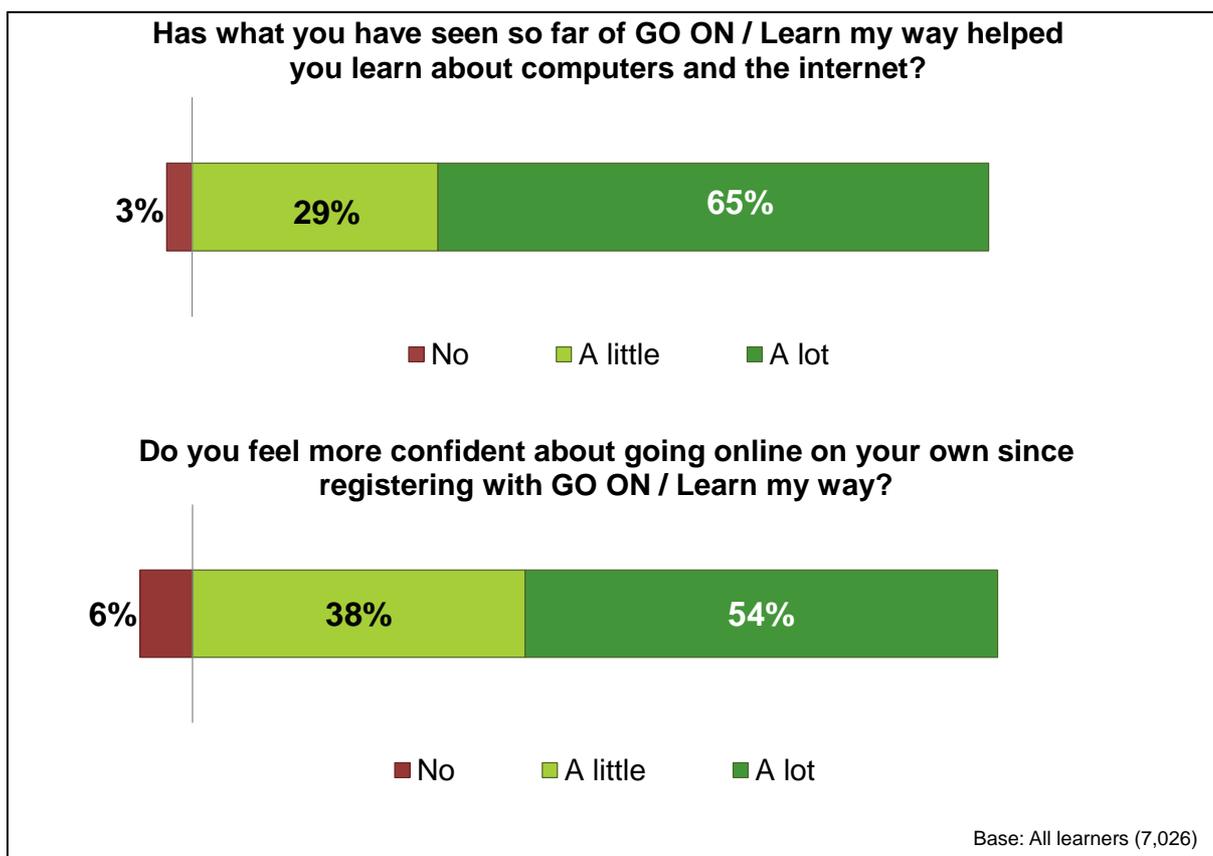
- 3.26 UK online centres measure Learner satisfaction with UK online and GO ON / Learn my way through three KPIs:
- Whether the Learner has a positive opinion of the UK online centre where they have been doing their learning
 - Whether their experience of GO ON has helped them learn about computers and the internet
 - Whether they are feeling more confident going online alone since registering
- 3.27 For more information on how these KPIs (and the Social Exclusion indicators) are derived from the survey questions, please see Appendix A.
- 3.28 Throughout 2012-13, as in 2011-12, Learners have been extremely positive about the UK online centre where they have done their learning, with the vast majority (88%) giving a rating of 'very good' or 'excellent', and 11% giving a rating of 'fair' or 'good'. This compares to 90% and 9% in 2011/12. Only a very small minority (28 Learners out of 6,058 who have done some learning at a centre – less than a single per cent) gave their centre a rating of 'poor'.
- 3.29 Learners aged 16-24 were less likely to give their centre a rating of 'excellent' – 43% compared with 59% overall.

Figure 3.5: Opinion of centre where doing learning



- 3.30 As Figure 3.6 overleaf shows, it is clear that UK online and GO ON / Learn my way have been helping Learners with their use of computers and the internet.

Figure 3.6: Helping Learners with computer and internet use



3.31 The vast majority of Learners (95%) feel that what they have seen so far of GO ON / Learn my way has helped them learn about computers and the internet, including 65% who feel they have been helped **a lot**. It is clear that throughout the year hard to reach groups and the socially excluded were particularly helped – among the most likely to feel that UK online had helped them learn **a lot** about computers and the internet were:

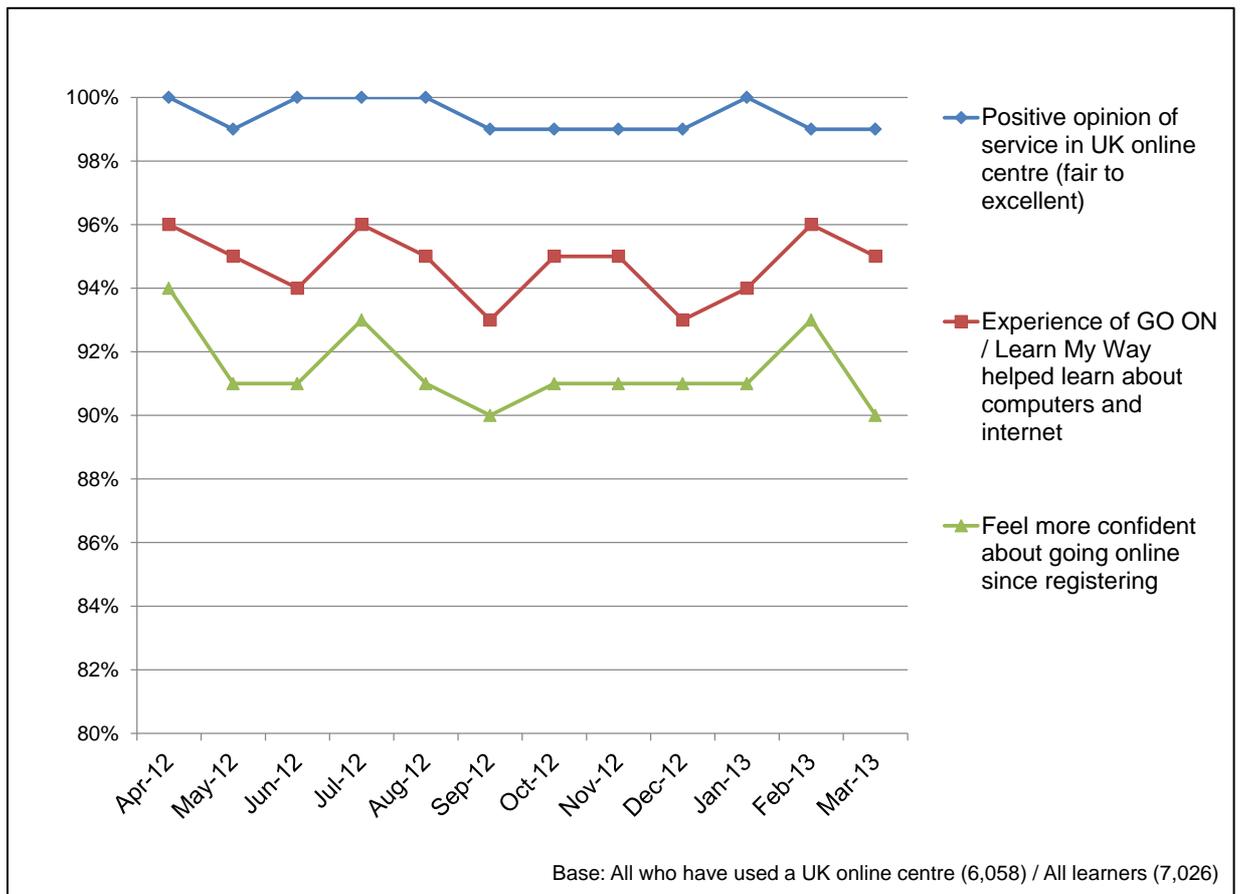
- Learners aged 65+ (74%) and aged 55-64 (71%)
- Disabled Learners (70%)
- BAME Learners (70%)

3.32 Similarly, nine in ten Learners (91%) have felt more confident going online on their own since registering, with 54% feeling **a lot** more confident. BAME Learners were more likely than white British Learners to feel **a lot** more confident since registering (59% compared with 53%).

3.33 However, unemployed Learners were less likely to feel that GO ON / Learn my way had helped them to learn a lot about computers and the internet (64%), and less likely to report feeling a lot more confident since registering (51%). This may be because unemployed Learners have more skills and confidence to start with but could also indicate that this group feels less well served by UK online centres.

3.34 The Learner survey KPIs are reported on a monthly basis. Figure 3.7 overleaf tracks these monthly figures across the period April 2012 to March 2013.



Figure 3.7: Learner Survey KPIs over time

3.35 While the positivity of Learners about the service offered by their UK online centre has been very consistent over the year, there has been some variation in the proportions saying that their experience helped them to learn about computers and the internet or that they felt more confident about going online since registering, with figures for both measures peaking in April and July 2012 and February 2013. However, across the year, Learners' satisfaction in these areas has been broadly in line with that in 2011-12.

4 Progression Survey

Headlines

- **Learners are mix of non, narrow and broad(er) users**
- **Once again, Learners confidence in using computers and / or the internet has increased since their registration**
- **Increases in 'Quality of Life' KPI, driven by increase in proportion using a government website or accessing their local authority's services online**
- **Increase in employment progression**
- **The vast majority of Learners believe they will go on to further learning, and a greater proportion believe they *definitely* will, compared with 2011-2012**
- **An increase in Learners experiencing 'Any Positive Outcome'**

Introduction

- 4.1 This chapter will cover the profile of Progression Survey respondents, before moving on to look at their computer and internet use both before and after signing up. It will then investigate various 'soft' impacts: first time and increased use of specific online activities, and how Learners have been able to make use of their new computer and internet skills. Next, it will look at the details of how they have progressed or are planning to progress into further learning, and how they feel their employment or employability has been affected. Finally, there will be a summary looking at the three main Progression KPIs – 'Quality of Life' (derived from the soft impacts), 'Further Learning', and 'Employment Progression'.

Profile of Progression Survey Respondents

- 4.2 The majority of Learners who took part in the Progression study between April 2012 and March 2011 were White British (78%), aged 45 and above (75%). Slightly over half were male (53%), and more than one third (37%) of participants considered themselves to have a disability.
- 4.3 The proportion of Learners aged 65+ has decreased since 28% in 2011-12, to 22% in 2012-13. This reflects the decrease in the proportion of this age group in the Learner survey over the same period. There has been an increase in the number of Learners aged 45-54 who were interviewed compared with the previous year (27% compared with 21% in 2011-12).
- 4.4 The proportion of BAME Learners has dropped from 22% last year to 17% this year, although the proportion of white British Learners has not increased – instead, a greater proportion chose not to state their ethnicity (5% compared with 2% in 2011-12).
- 4.5 Compared to the profile of the 7,026 Learners who completed the online survey during the 2012-13 period, the ethnicity of Learners taking part in the progression survey is in line. However, a greater proportion of men were interviewed in the progression survey (53% compared with 48% of the online survey population), as well as a greater proportion of disabled learners (37% vs. 31% online). A smaller proportion of younger Learners were interviewed (24% were aged 16-22 compared with 35% in the online survey, while 75% were aged 45 and above, compared with 62% in the online survey).

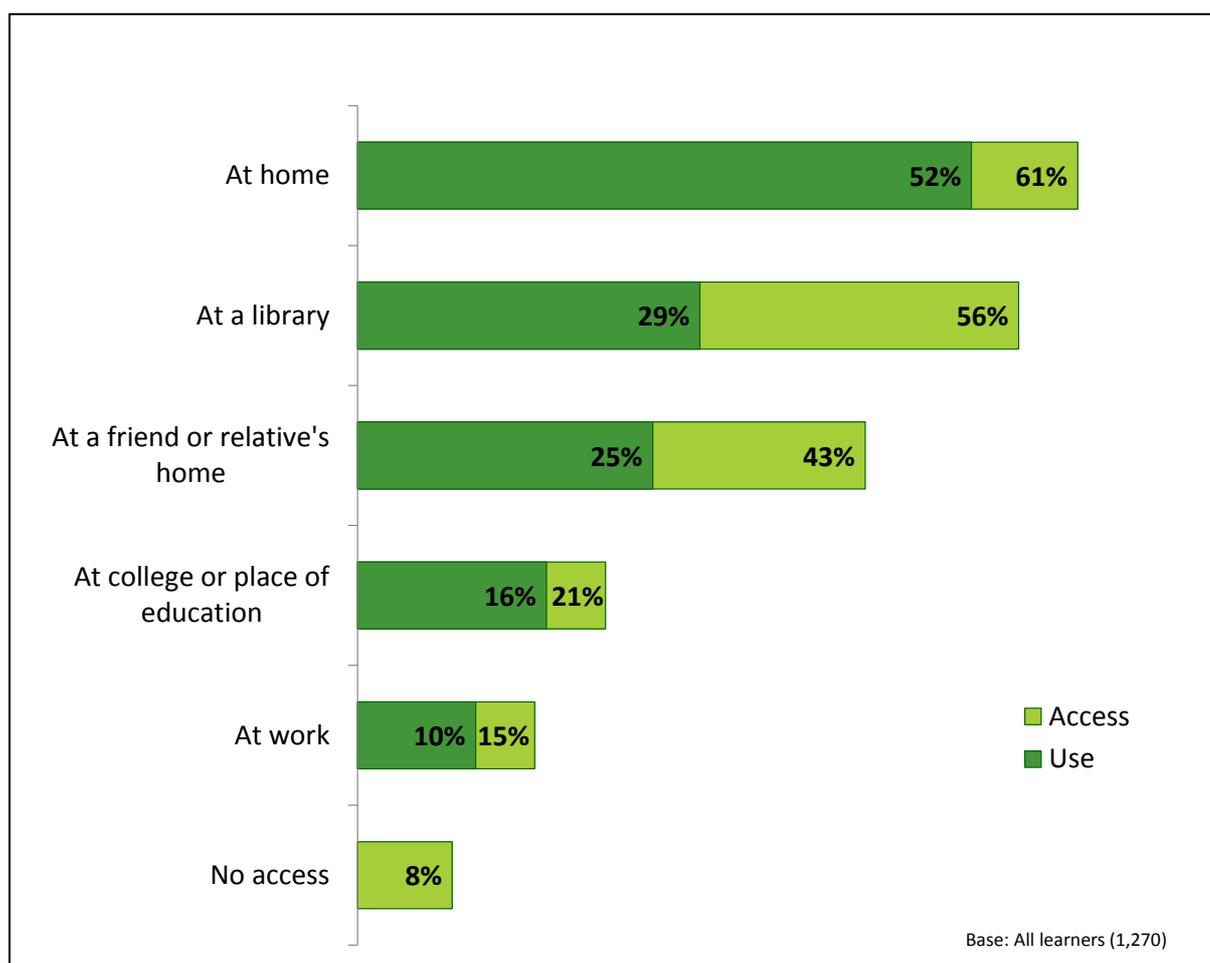


- 4.6 Mirroring the profile changes in the Learner Survey, a greater proportion of Learners interviewed for the progression survey were employed (42%, compared with 34% in 2011-12) and had been referred by Jobcentre Plus (20%, compared with 17% in 2011-12).

Computer and Internet use before registering / signing up

- 4.7 In the build-up to registering, the vast majority of Learners (85%) had used a computer before. The majority of these Learners with previous computer experience used a computer regularly (32% every day; 41% at least once a week) and had been online within the week before registering (60%).
- 4.8 At first sight, this incidence of prior computer and internet use is perhaps surprisingly high. However, as reported earlier, many of these Learners have limited knowledge and experience, or can only undertake fairly simple activities (with more than two-fifths also stating that they had recently been online for the first time and wanted to learn more, hence coming to UK online centre), or have always had someone on hand to help them. Centres will need to focus energies on providing support to those individuals with the greatest need (non-users in particular) while at the same time ensure delivery and support is tailored to those Learners with more experience and confidence.
- 4.9 Among the most likely to have never been on a computer before were:
- Those with no qualifications (22% compared with 15% average)
 - Learners who were unemployed (18%)
- 4.10 Interestingly, in contrast to 2011-12, Learners aged 65+ were **not** more likely to have never been on a computer before.
- 4.11 As Figure 4.1 overleaf shows, before registering Learners were most likely to have access to the internet at home (61%) with more than half (52%) having made use of internet access in their home. Both of these figures have decreased since 2011-12, when 65% of Learners had access in their home, and 57% had made use of it. The proportion of Learners having access to or using the internet at work has also decreased – in 2011-12, 19% had access at work and 13% made use of this access, whereas in 2012-13 these figures have fallen to 15% and 10% respectively.
- 4.12 In similar proportions to 2011-12, over half of Learners (56%) stated that they had access to the internet at a local library, and just under one in three (29%) had used this facility – a relatively low proportion that suggests awareness and usage of libraries' computer and internet facilities could be higher. Eight per cent of Learners said they did not have access to the internet at all.



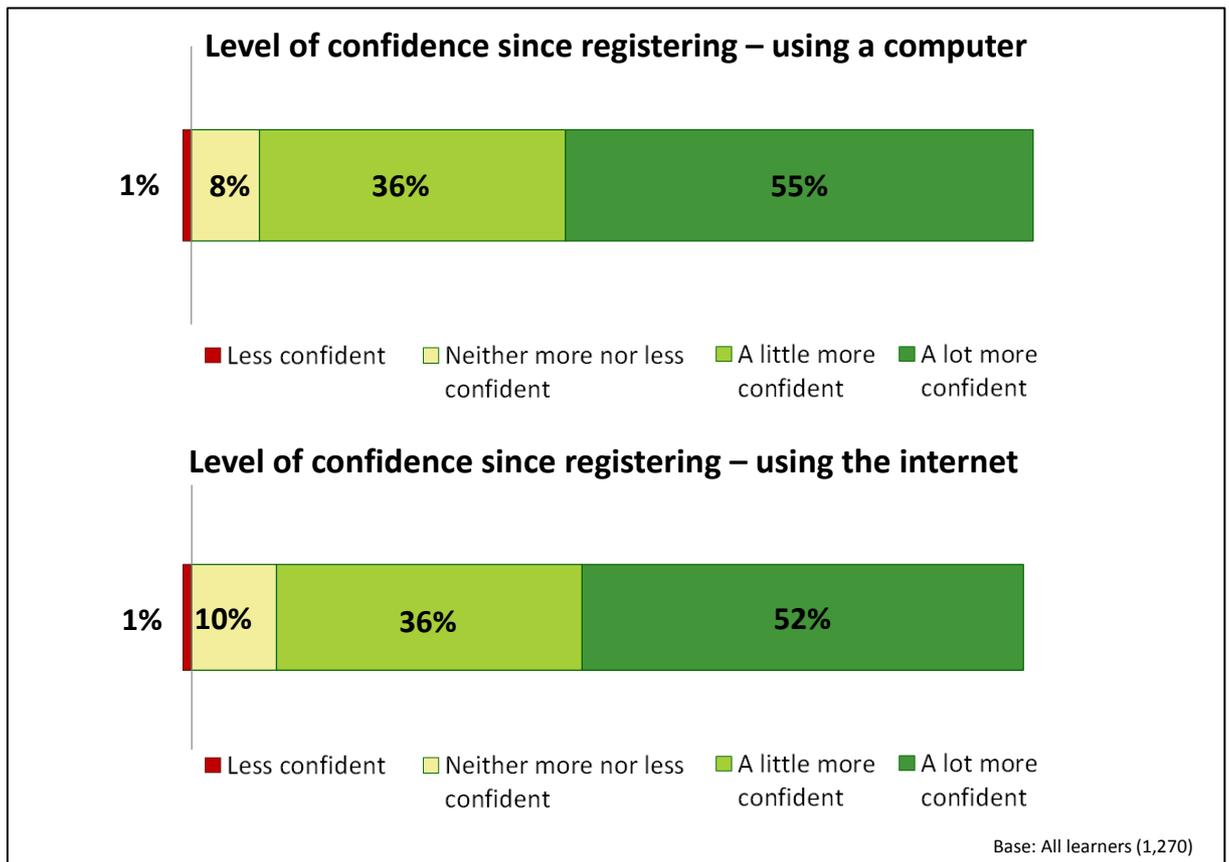
Figure 4.1: Where had access to, and used, the internet prior to registering

- 4.13 Two-fifths (37%) of learners had undertaken computer and/or internet related courses prior to registering – in the majority of cases (73%), these courses took place at least two years before.
- 4.14 Before signing up/registering, less than half (45%) of 2012-13 Learners felt confident using computers and the internet – just over half (55%) did not feel confident. Older Learners were the least confident (37% of those aged 55-64 and 39% of those aged 65+ were confident). Learners with no prior qualifications were less confident than Learners with prior qualifications (38% were confident). BAME Learners were more likely to feel confident (54%, compared with 43% of White British Learners).
- 4.15 These findings are generally similar across all four quarters and paint a consistent picture of Learners' computer and internet use prior to registering.

Computer and internet use after registering / signing up

- 4.16 Within the month or two since registering, three-quarters (74%) of Learners had used a computer at least ten times. Just under seven in ten (68%) had been on the internet at least ten times. Only a very small minority had not used a computer (44 Learners – 3% of Learners) or the internet (88 Learners – 7% of Learners) since registering.
- 4.17 As Figure 4.2 below shows, 2012-13 Learners’ computer and internet confidence has increased significantly since registering. Nine in ten (91%) were more confident about using a computer and 88% felt more confident when using the internet. A very small minority of Learners felt that their confidence had actually decreased since registering – 13 Learners (1%) felt less confident using computers and 17 Learners (1%) felt less confident online.
- 4.18 Learners aged 65+ were more likely to feel more confident about using computers since registering with GO ON / Learn my way (95% compared with 91% overall). Learners with no qualifications were more likely to feel more confident about using the internet since registering (91% compared with 88% overall).

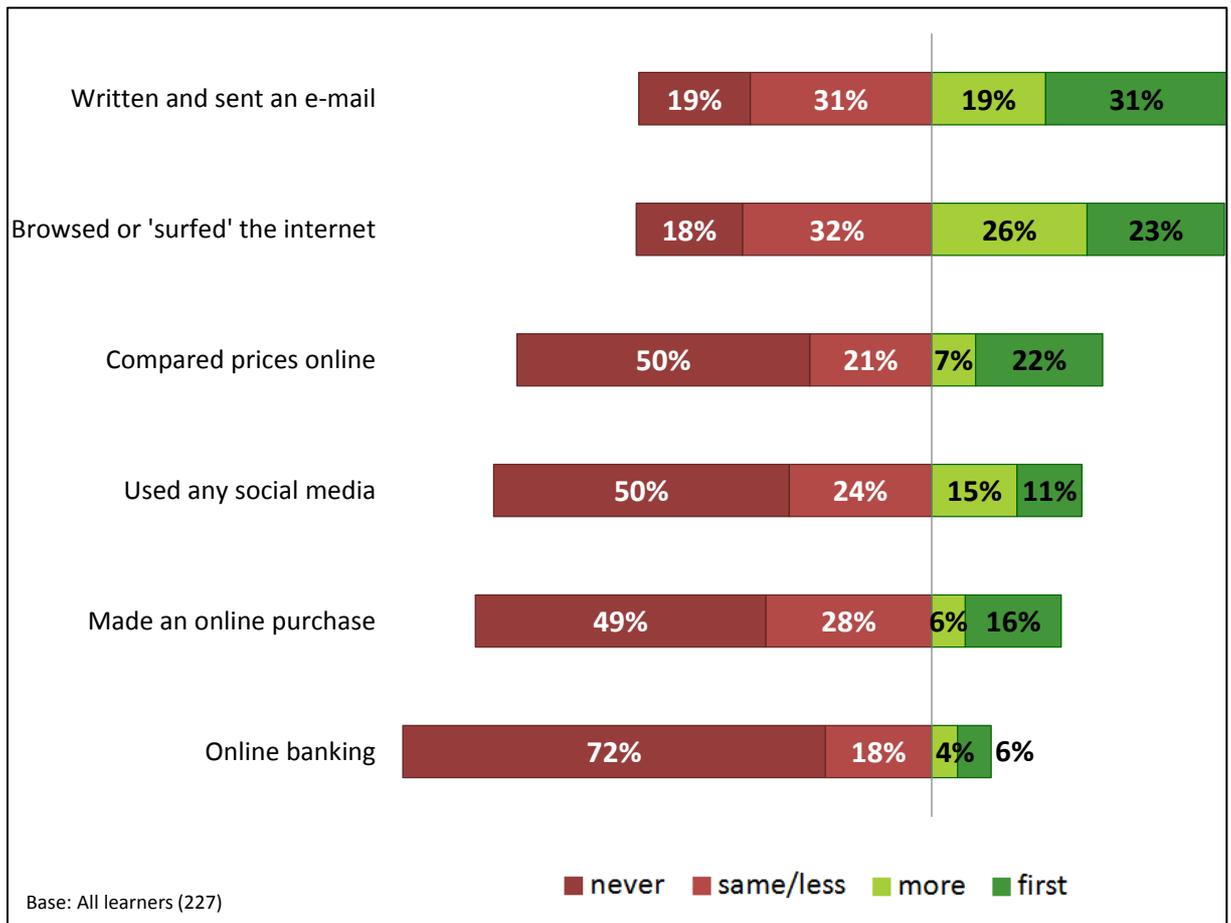
Figure 4.2: Change in confidence since registering with GO ON / Learn my way



First time and increased internet use

- 4.19 The progression survey provides valuable insight into whether signing up to Learn my way results in non-users taking part in online activities for the first time, as well as whether it has impacted on narrow users by leading them to take up additional activities and / or increase the scope and frequency of their internet use.
- 4.20 Figure 4.3 shows, for six key online activities, the proportion of learners who have undertaken each for the **first time** since signing up with Learn my way and the proportion who had undertaken each previously but who, since signing up, have done the activity **more often**¹. This is compared to the proportion who have **never** undertaken each activity and the proportion who had done so before but who, since signing up, have undertaken the activity **less often or the same** as before.

Figure 4.3: First time and increased internet use since signing up with Learn my way



- 4.21 Approaching a third of Learners (31%) have written and sent an e-mail for the first time since signing up with Learn my way with over a fifth browsing the internet (23%) and comparing prices online (22%) for the first time.

¹ This question was introduced in January 2013, hence the lower overall base size. It replaced an existing question which just focused on first time internet use and was designed to a) provide additional information about narrow users and b) to cut down on the length of the survey as a result of the large number of online activities that were previously being asked about



- 4.22 When those Learners who report increased use of the internet since signing up are combined with these 'first-timers', around a half of learners could be described as having increased their internet use in terms of e-mailing and browsing the internet (although as we'll see, for some, this increased activity would have been likely to have happened anyway without taking part in Learn my way learning).
- 4.23 In addition, half (56%) have been able to use their new computer and internet skills to develop their personal interests and hobbies.
- 4.24 For the majority of Learners who have performed online activities for the first time, who have done them more often, or who have been able to develop their hobbies or interests, undertaking learning through Learn my way has generally enabled these developments – more than nine out of ten felt that Learn my way had directly enabled them (21%) or had certainly helped (72%).
- 4.25 A small but significant minority of Learners had gone even further and invested financially in their computer and online development - one in six (18%) had purchased a computer/laptop and one in six (17%) had installed the internet at home since registering with Learn my way.

Use of government websites

- 4.26 Just over three quarters of Learners (76%) had used a government website or accessed their local authority's services online. This is an increase from 69% in 2011/12.
- 4.27 Approaching three quarters (72%) had visited a national government website, most commonly the Gov.uk website (58%)², Jobcentre Plus' online services (42%) and/or NHS Direct (25%) while just over two fifths (42%) had accessed their local authority's online resources, most commonly library services (18%) and/or council tax and housing services (both 12%). The overall increase in use of government websites has principally been driven by an increase in the proportion of Learners using Gov.uk / DirectGov (48% in 2011/12) and JobCentrePlus' online services 33% in 2011/12). As discussed earlier this may partly reflect the changing profile of Learners completing both the Learner and Progression Surveys, with greater proportions of unemployed Learners and Learners who had been referred by Jobcentre Plus.
- 4.28 As in 2011/12, Learners aged 65+ were the much less likely to have used a government or local authority website/online service since starting their learning (55% compared with 78% of Learners aged under 65).
- 4.29 Learners who had visited a government or local authority website had generally done so on their own behalf (81% - 19% did so, at least in part, for someone else). The majority of these Learners (69%) stated that they had made fewer visits or phone calls to a government organisation as a result of using these services online (up slightly from 66% in 2011/12). Just under a third (31%) felt that they had not saved any phone calls or visits.

Soft impacts and advocacy

- 4.30 Learners were very positive about having registered / signed up a month or so down the line – virtually all (96%) agreed (82% agreed strongly) that they were glad they had done so. These proportions were consistent throughout the year and with last year.

² Learners are asked for their awareness of "Gov.uk – previously known as Directgov"



- 4.31 Signing up with GO ON / Learn my way has also had a positive impact for the majority of Learners in the following ways:
- Being more enthusiastic about learning (91% agreed; 89% in 2011/12)
 - Feeling better equipped to make decisions about the future in terms of career, training or learning (81% agreed; 76% in 2011/12)
 - Improving self-confidence (88% agreed; 87% in 2011/12)
 - Helping others because of increased self-confidence (73% agreed; same as in 2011/12)
 - Being more independent because of the computer and internet skills learned (82% agreed; 79% in 2011/12)
 - Taking part in more community activities (70% agreed; 67% in 2011/12)
 - Having a better idea about what to do in life (74% of those aged under 65 agreed that this was the case; same as in 2011/12)
- 4.32 Over two fifths (43%) had already passed on some of the skills they had learned since registering. This proportion has gradually declined over the course of the year from 47% in 2011/12 and 46% in Q5 down to 38% in Q8.
- 4.33 Learners' positive perception of GO ON / Learn my way is also reflected in a high level of advocacy. Three fifths (59%) of Learners had already recommended UK online centres to another person by the time they were followed up with for the Progression survey and virtually all (94%) of the remainder felt that they would make such a recommendation. These figures were broadly consistent throughout the year although the proportion who had already recommended UK online centres to another person has fallen when compared to 2011/12 (63%).

Impact on Further Learning

- 4.34 One quarter (25%) of Learners had already gone on to another course or programme of learning since signing up/ registering; 13% were studying towards a formal qualification (typically GCSEs or NVQs in core skills such as maths or English and/or ECDL) and 14% were taking part in more informal learning for their work or personal life that does not lead to a qualification – a decrease from 18% in 2011-12.
- 4.35 The oldest learners (those aged 65+) were less likely to have started some learning since registering/signing up (13% compared with 28% of Learners aged under 65).
- 4.36 One in six Learners (17%) have sought careers or skills advice since starting the learning. Of those who had sought careers or skills advice, two-fifths (42%) had done so online.
- 4.37 Together, these groups of Learners (those who had gone on to either formal or informal learning, or who had sought careers or skills advice since starting their learning) make up the Learning Progression KPI (35%).
- 4.38 The vast majority of Learners (91%) think they will go on to further learning in the future (be it computer-related or not). Although the overall proportion of Learners who think they will go on to further learning in 2012-13 is in line with that in 2011-12, a greater proportion of them believed that they **definitely** would (67%, compared with 60% in 2011-12), while the proportion who only believe they are **likely to** has decreased (24% compared with 29% in 2011-12).



4.39 The main further learning interests were:

- 'General' computer skills (including MS Office) (40%)
- Photography courses (18%)
- More advanced IT skills such as the use of design and photography software or programming (8%)
- English (6%) and Maths (5%)

4.40 Nearly one-fifth (18%) of Learners had asked UK online centre staff for advice or information about doing more learning or training. This figure gradually increased across the four quarters, from 16% in Quarter 5 to 21% in Quarter 8; the overall figure is an increase on 14% in 2011-12. Advice was mostly sought on developing IT skills and further learning more generally, but also careers advice.

Employment progression

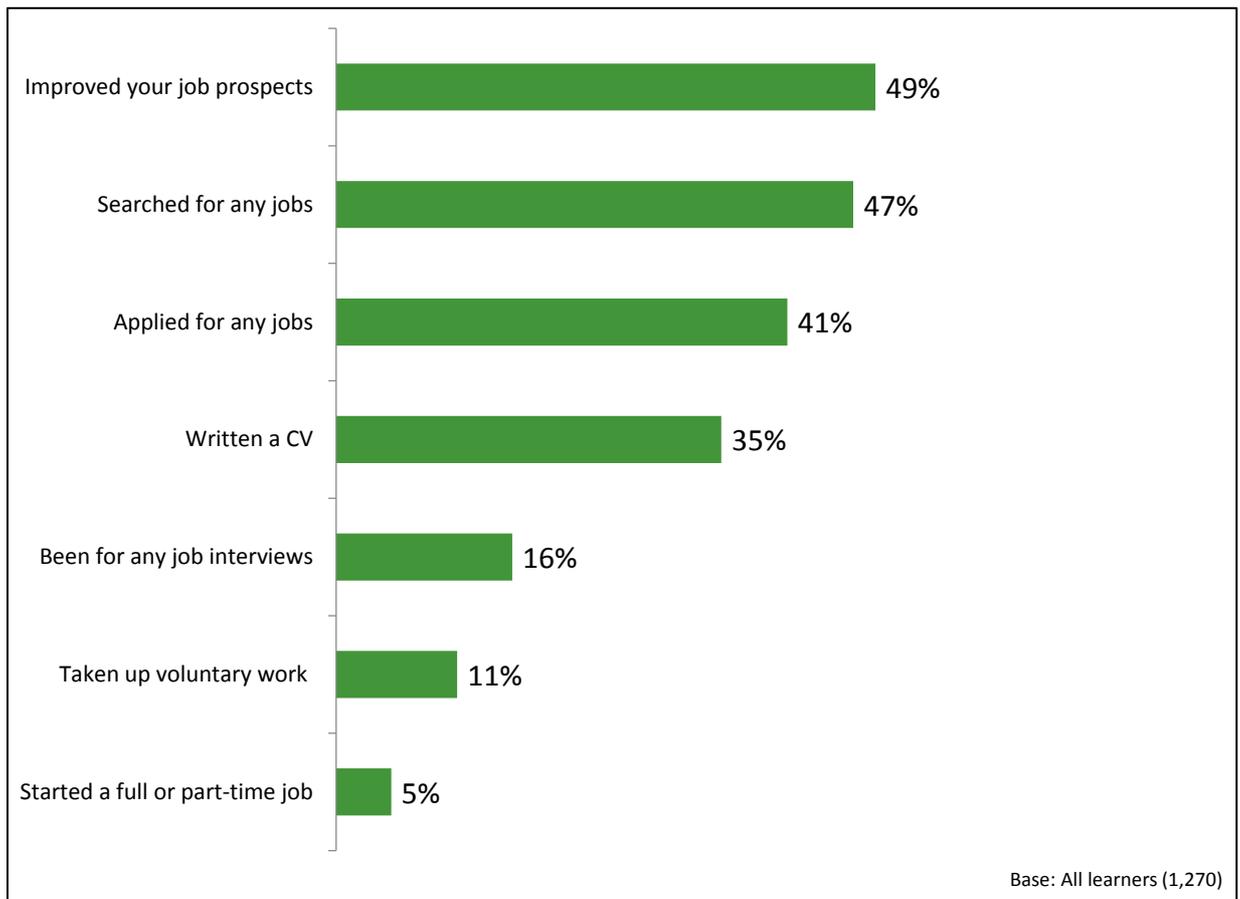
4.41 Two thirds of Learners (66%) have experienced employment progression in the month or two since registering, which is an increase on the 60% of Learners who had done so in 2011-12. This includes progression both in terms of finding work and experiencing improvements or developments within a job already held when completing the Learner survey.

4.42 Differences by demographics largely reflect the relative likelihood of individuals being in work / seeking work in the first place. As Learners get nearer to retirement, their likelihood to experience employment progression decreases. Whilst 100% of 16 – 24s were achieving progression in this area, this drops to 67% of 55 – 64 year olds and just 9% of those aged 65 or more. Disabled Learners were also less likely to have experienced employment progression (61% compared with 69% of Learners without a disability).

4.43 As would be expected, unemployed Learners were particularly likely to have experienced employment progression (94%, compared with 77% of employed Learners, and just 33% of Learners who were not in work). Combined with the increased proportion of unemployed Learners in 2012-13, this will have contributed to the overall increase in employment progression.

4.44 Other demographic differences were that men were more likely to have experienced employment progression than women (69% vs. 63%) and BAME Learners were more likely to have done so than White British Learners (76% vs. 63%).



Figure 4.4: Progression into or towards work since registering/signing up

4.45 Learners have taken steps towards employment by searching for jobs (47%), applying for jobs (41%), writing a CV (35%) or going to job interviews (16%). Just under half (49%) believe they have improved their job prospects since signing up/registering.

4.46 Positively, over four-fifths of Learners searching and applying for jobs and writing CVs have used a computer and/or the internet in their endeavours:

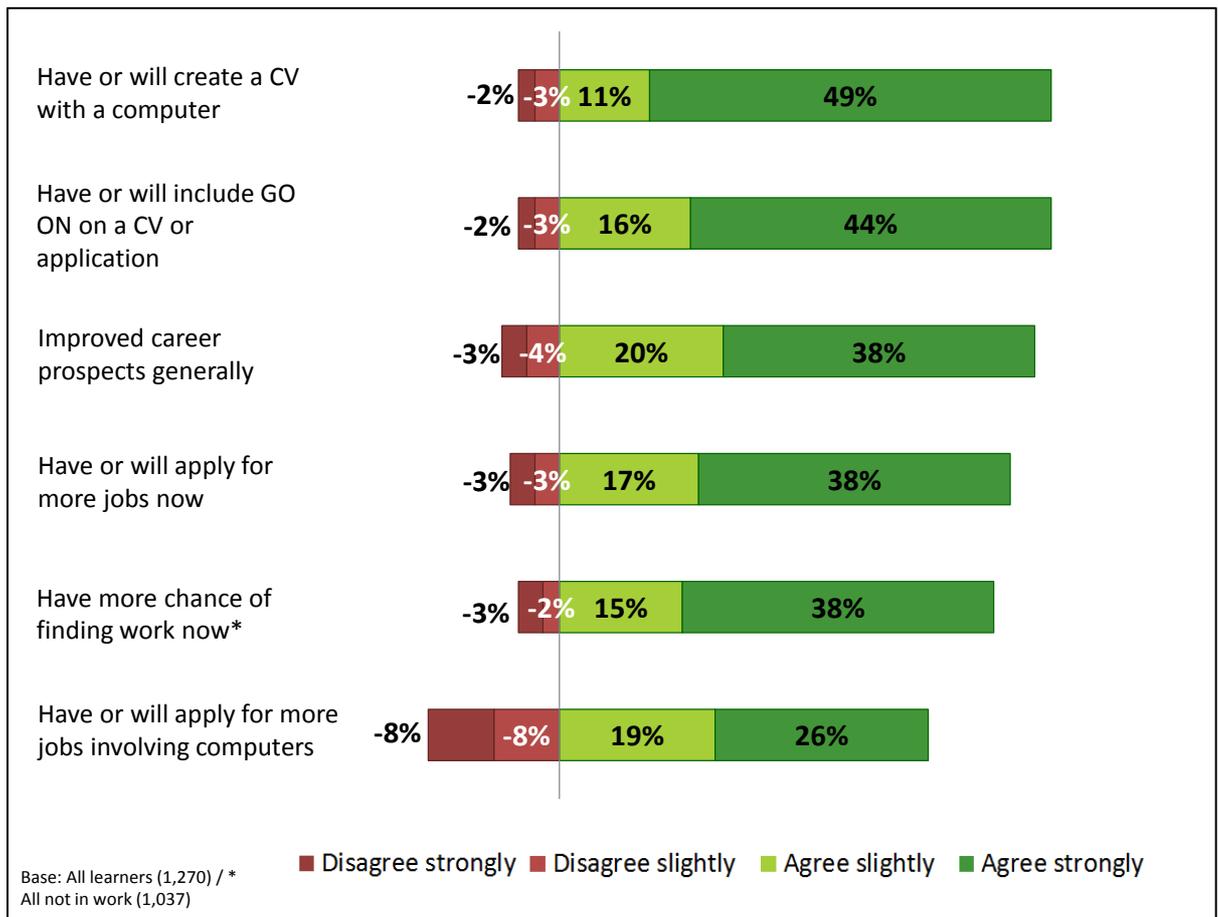
- 90% have searched for jobs online
- 87% used a computer to write their CV
- 82% have applied for jobs online

Perceived impact on employability

4.47 Learners were asked whether they had improved various aspects of their employability as a result of what they had learned through GO ON / Learn my way. Achieving employment outcomes and improving employability were not motivations for the majority of the over 65s, who make up over a fifth of 2012 – 2013 Learners interviewed for the Progression survey, hence the proportion who said these matters were not relevant was high (between 30% and 40% in each instance).



Figure 4.5: Perceived impact of GO ON / Learn my way on employability



4.48 A majority of Learners (58%) agreed that they had improved their career prospects generally or that they had more chance of finding work (53% of those not in work) as a result of registering/signing up. Over four fifths (85%) of those unemployed agreed that they had more chance of finding work as a result of registering/signing up.

4.49 In addition, over half of Learners agreed that they would:

- Mention GO ON / Learn my way on a CV or job application (60%, increasing to 86% among those unemployed)
- Use a computer to create a CV (60%; 88% among unemployed)
- Apply for more jobs now (55%; 85% among unemployed)

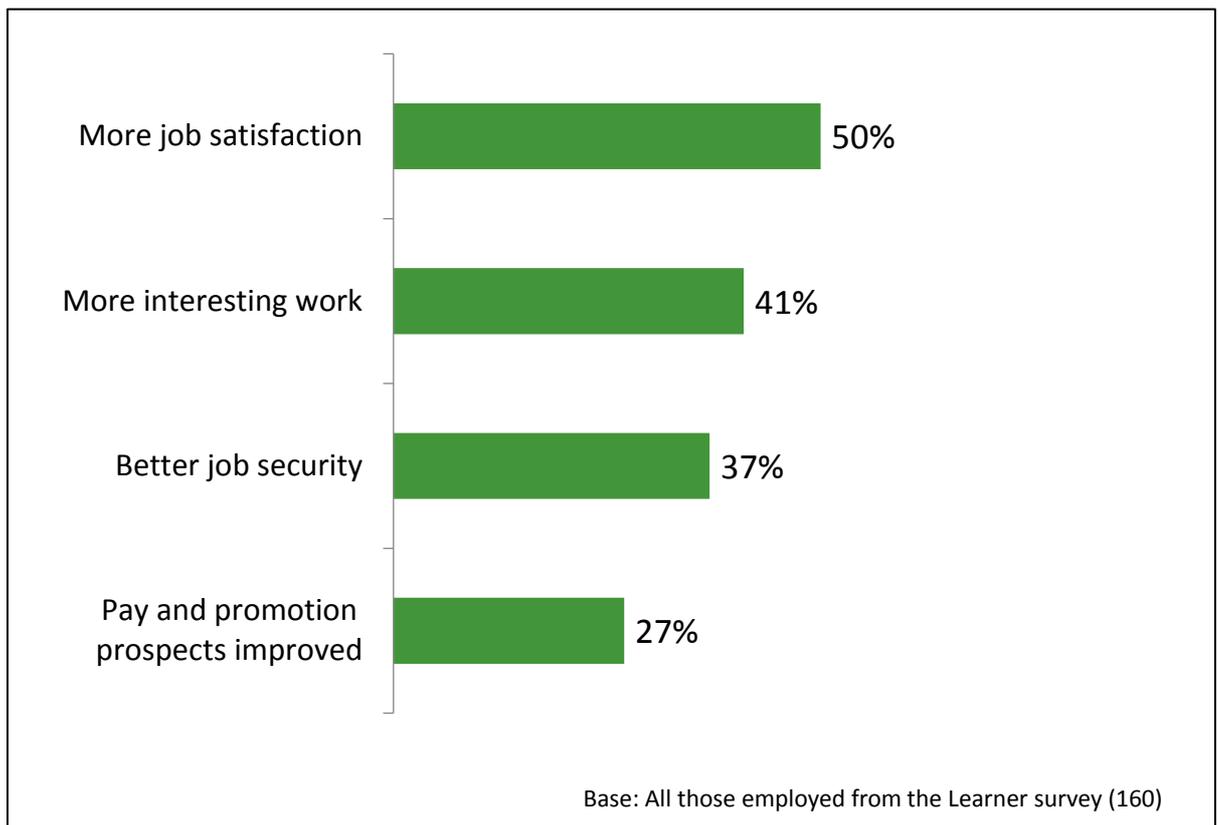
Impact on current employment

4.50 Learners who were in employment at the time of registering or who stated that they had entered into full or part time work since then were asked if they had used any skills learned so far from GO ON / Learn my way at work. Over two fifths (43%) of this cohort felt that they had put their new skills to use at work.



4.51 Learners who were in employment at the time of registering were also asked if they had experienced any improvements at work as a result of what they had learned from GO ON / Learn my way. As Figure 4.6 below illustrates, in the relatively short period of time since beginning their learning, an encouraging proportion of Learners have experienced improvements: half (49%) are getting more job satisfaction, a third are doing more interesting work (34%) or have better job security (34%) and just under a third (30%) believe their pay and promotion prospects have improved.

Figure 4.6: Improvements



Key Performance Indicators (KPIs)

4.52 As mentioned in the beginning of this chapter, UK online centres' success in terms of helping Learners progress is measured through three KPIs:

- Employment progression (undertaken any activities relating to finding a job)
- Learning progression (carried out any additional learning since registering)
- Improvements in 'Quality of life' (carried out computer/internet related activities for the first time or more often, developed hobbies and interests³ or used government services online)

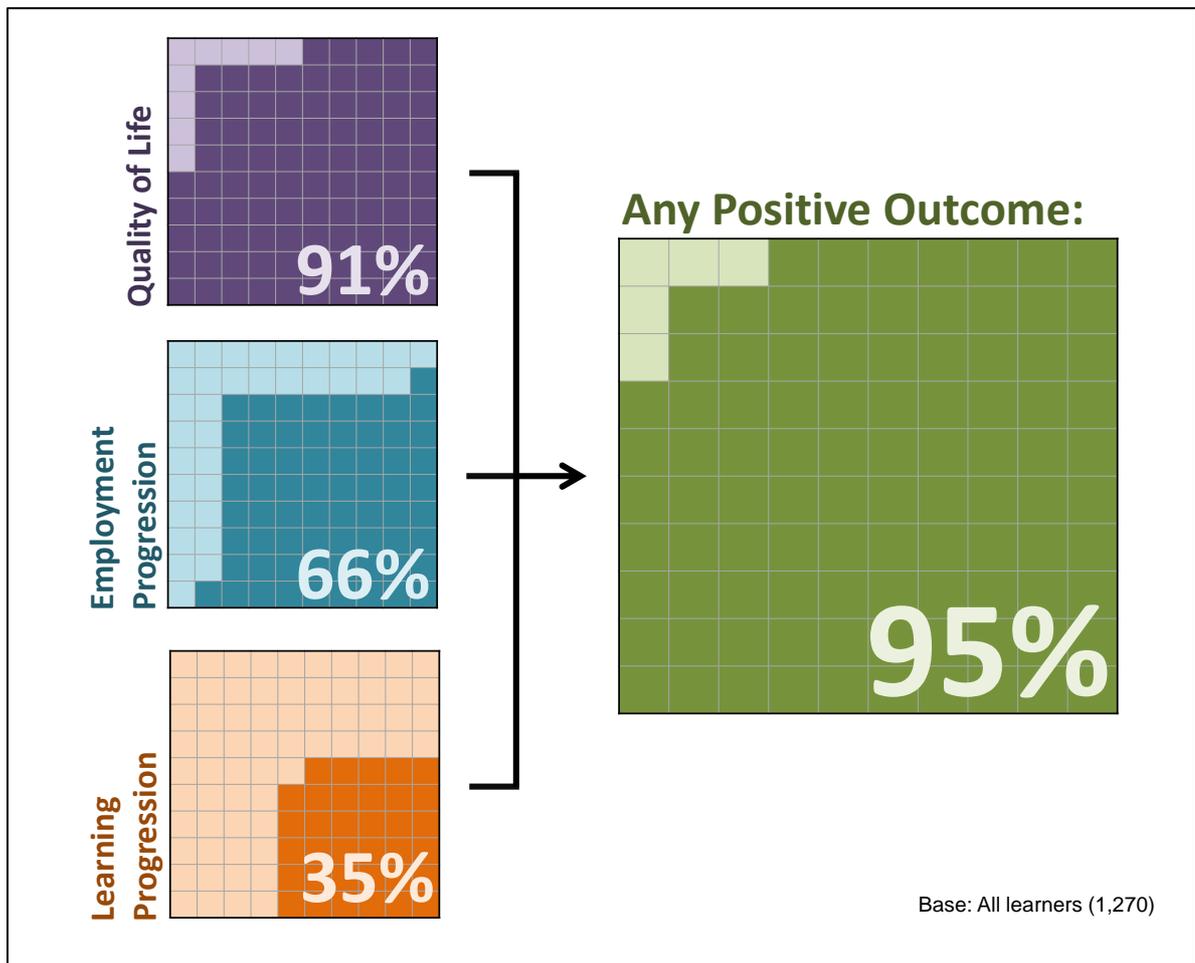
4.53 For more detail on how these KPIs are derived from the survey questions, please see the visualisation in Appendix B.

³ Inclusion in the KPI also required Learners to indicate that they had done these things either as a direct result of the course or that the course helped



4.54 Figure 4.7 illustrates these three KPIs, and how they feed into the overall measurement of success, 'Any Positive Outcome.'

Figure 4.7: Progression Survey – Key Performance Indicators



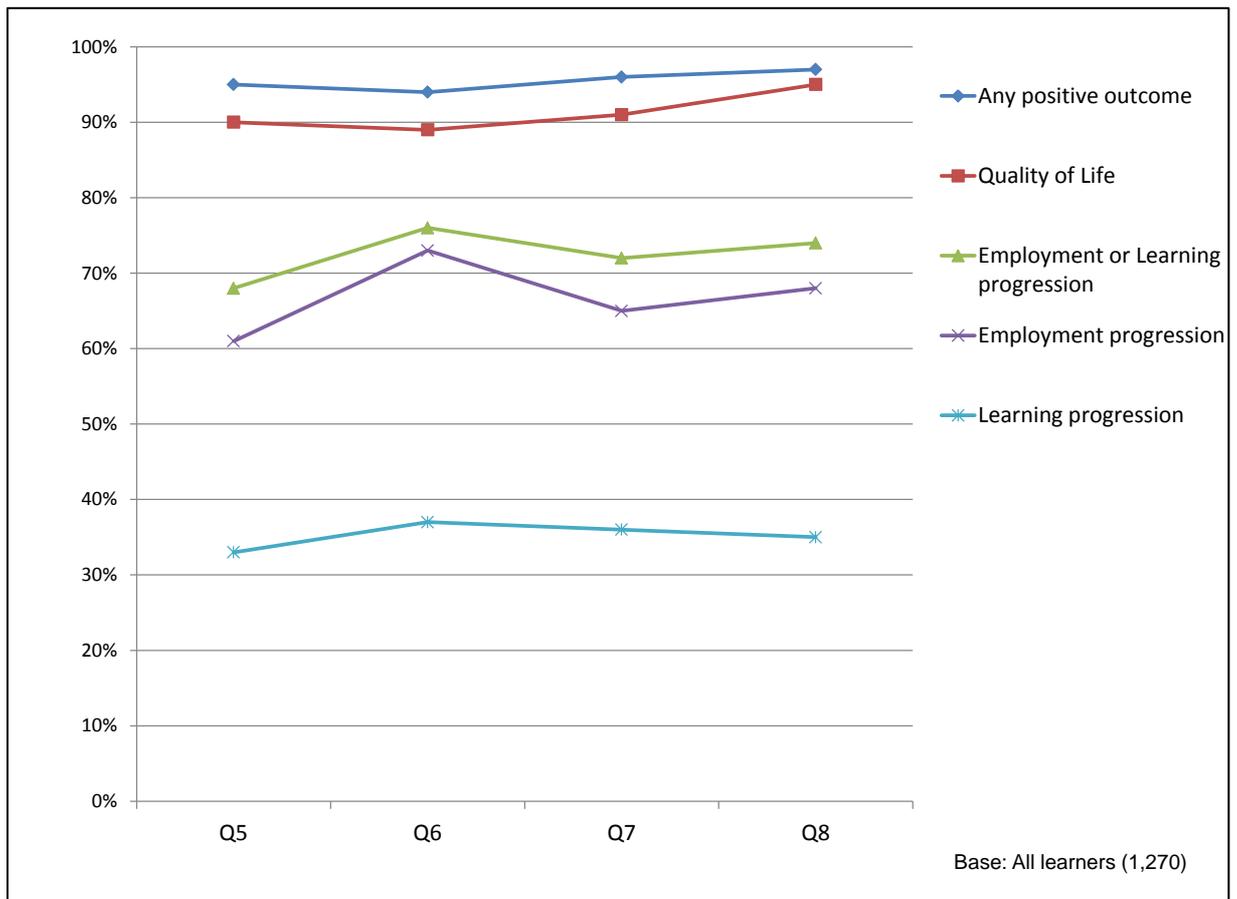
4.55 Encouragingly, the proportion of Learners experiencing 'any positive outcome' has increased from 91% in 2011-12 to 95% in 2012-13. This overall rise has been driven by increases in both 'quality of life' (91% compared with 85% in 2011-12) and 'employment progression' (66% compared with 60% in 2011-12). The proportion of Learners experiencing 'learning progression' is in line with 2011-12.

4.56 Quarter 6 (comprising interviews with Learners who registered in June, July and August 2012) saw a high point for 'employment or learning progression' (76%); this was mostly driven by a spike in 'employment progression' (73%, up from 61% in Quarter 5), although there was a slight (but not significant) rise in 'learning progression' also (37%, up from 33% in Quarter 5). Despite this slight rise in Quarter 6, 'learning progression' has remained very steady across all four quarters.

4.57 The Progression Survey KPIs are reported on a quarterly basis. Figure 4.8 overleaf tracks these quarterly figures across the period April 2012 to March 2013 (involving interviews with Learners who first registered with UK online between March 2012 and February 2013).



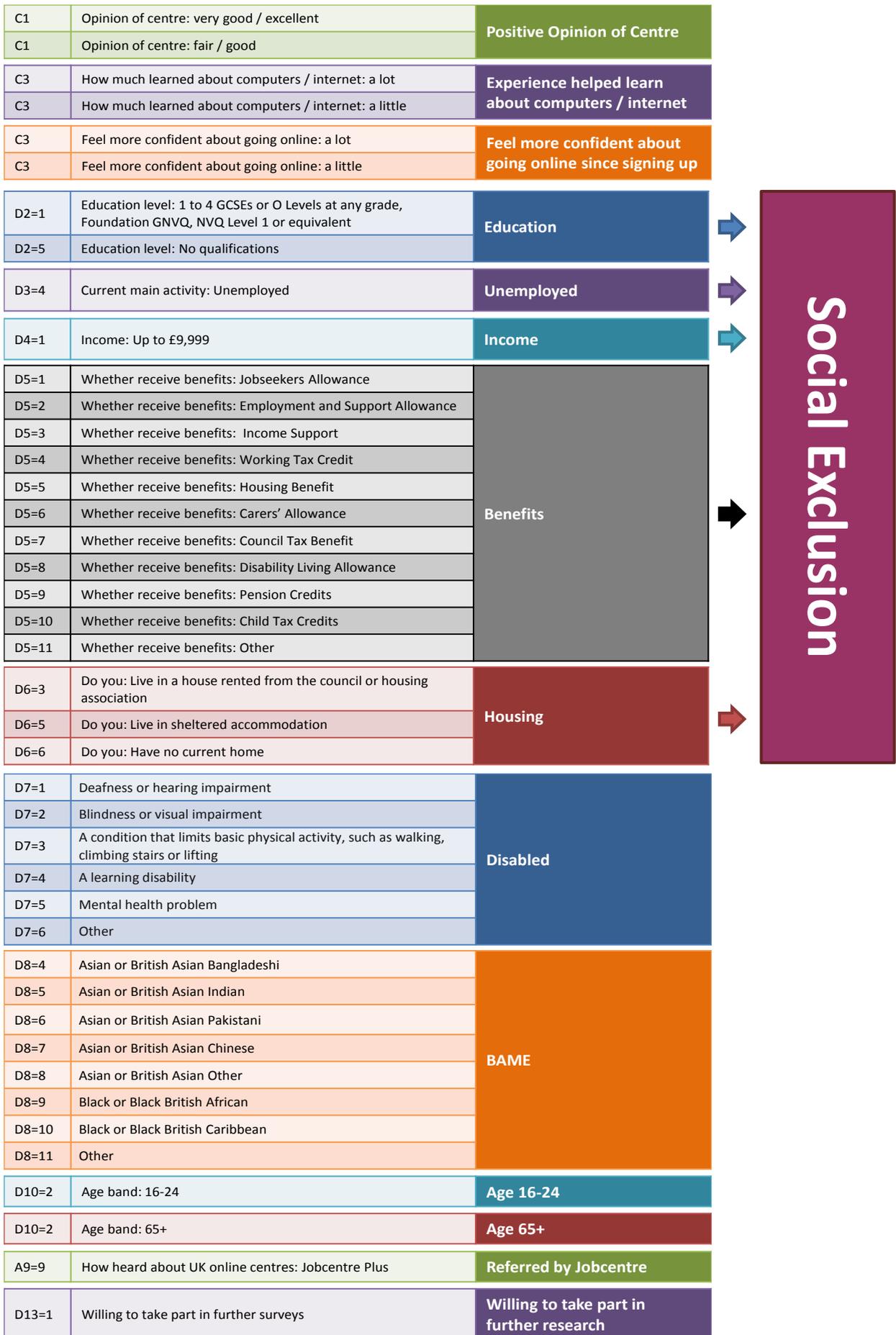
Figure 4.8: Progression Survey KPIs over time



5 Appendix A – Learner Survey KPIs

- 5.1 Overleaf is a visualisation showing how the Learner Survey KPIs, and the various Social Exclusion and demographic measures, are derived.





Appendix B – Progression Survey KPIs

- 5.2 Overleaf is a visualisation showing from how the Progression Survey KPIs are derived from the survey questions.



