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ISLAND GLOBAL RESEARCH INSIGHTS

**Island Global Research
is a research and
consultancy company
with a focus on islands.**

Technology for Teaching: A New Performance Indicator?

The Google Education Summit came to Guernsey last month, showcasing how their apps can assist educators. We take a look at the transformative power of technology in island education settings, and what this means for the more traditional performance indicator of Pupil:Teacher ratio.

Online Shopping Trends Survey 2016

Our Online Shopping Trends survey results reveal the extent of online purchases in Guernsey, Jersey, Isle of Man and Bermuda, with the average household reportedly spending £6000-£7500 online in 2016 (excluding travel).

Island Global Research Strengthens Senior Team

Lindsay Jefferies becomes managing director of Island Global Research (IGR), taking over from Chris Brock. Find out more about Lindsay's experience and her vision for IGR.

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TECHNOLOGY FOR TEACHING: A NEW PERFORMANCE INDICATOR?

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As your child googles the answers to their homework and proceeds to play on your smartphone, it probably won't come as a surprise that the tech giant Google has spotted how valuable their programmes are to modern learners. Technology is not only a mainstream way of delivering education, but an expected part of a teacher's toolkit.

Employing appropriate technology to improve the provision of education is a global phenomenon, and Google focused on uses for their suite of collaborative software when they came to Guernsey. The real potential for technology in education goes far beyond this though.

PIONEERS OF DIGITAL TEACHING

Tasmania and Kodiak Island are pioneers in digital teaching. Tasmanian children who live in remote areas or are unable to attend school can be taught online through 'eSchool', a web-based tool to develop and deliver Australian Curriculum courses. Kodiak Island (Alaska) have taken the concept one step further. In 2014, robotic teachers were introduced to remote schools in the borough. A Segway-type base with an attached iPad allows teachers to move around the classroom and interact more realistically, providing a much higher quality of teaching when a physical presence is not possible. Alaska generally has taken advantage of video broadcasting, podcasts, transportable internet and satellite communications for isolated schools.

More commonly, islands are realising the potential of technology for distance learning at a higher level. The University College of the Caribbean provides both hybrid and fully online degree programmes. Lecturers can upload course content and interact with students in chat sessions. Students can read lecture notes, submit assignments and sit exams online. This brings access to specialised teaching when having a specialist on-island isn't viable.

Teaching Technology

Parallel concerns are equitable access to technology, and ensuring that the workforce are technologically literate. Schooling systems across the globe are revising curriculums so that the next generation leaves education with the right skills for employment in a digital workplace. In terms of islands, this encompasses Singapore, the Cayman Islands, Iceland, Jersey and many others.

It is hugely important to governments with aspirations for growing the digital economy. This includes islands looking to diversify away from, or within, traditional sectors such as finance and tourism. Supporting compulsory education with other opportunities to grow digital skills throughout life, is also becoming increasingly important given ageing workforces and the rate of development in the technology industry.



MEASURING PERFORMANCE OF AN EDUCATION SYSTEM

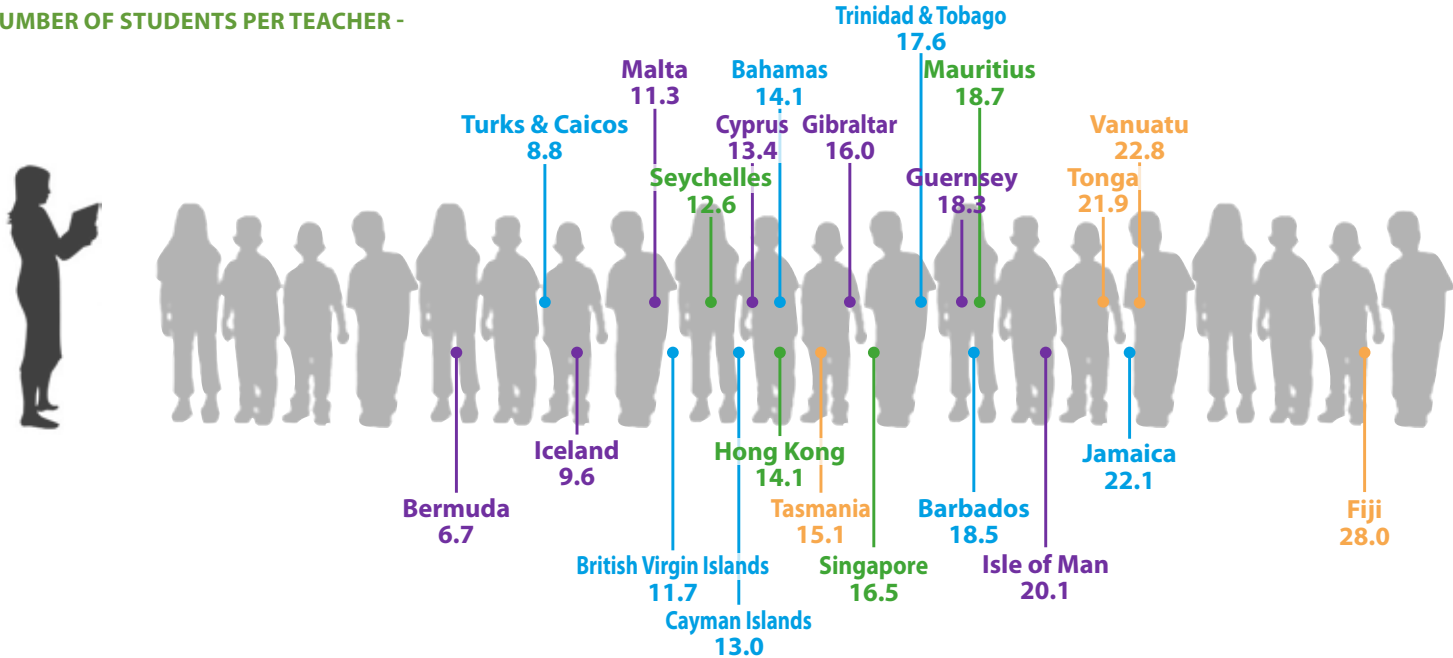
Despite this, the use of technology is not generally measured as a gauge of education quality or access. Instead, pupil:teacher ratio remains one of the most internationally cited key performance indicators. (This is also due, in part, to the difficulty of measuring attainment across different education systems thanks to differing student ages, exams and teaching styles.)

The pupil:teacher ratio in primary education for the sample of islands in the graphic below ranges from 28 students for every teacher to as low as just under 7.

A smaller ratio indicates fewer pupils per teacher on average. This is generally accepted as helping to improve the quality of education that students receive.

PRIMARY EDUCATION PUPIL:TEACHER RATIO

NUMBER OF STUDENTS PER TEACHER -



Almost all the islands here compare favourably or similarly to others at the same level of development. To put the figures into context, the US and the UK have ratios of 15 and 17 respectively, while lower middle income countries have an average of 29 students to each primary teacher. Bermuda actually has the lowest primary education pupil:teacher ratio (recorded by the World Bank in 2014).

- KEY:
- Europe / North America
 - Caribbean
 - Indian Ocean & SE Asia
 - Pacific

PUPIL:TEACHER RATIOS IN AN ISLAND SETTING

Small class sizes in island schools can lead to superficially competitive pupil:teacher ratios, but it hides other issues. Fewer opportunities, smaller overall peer groups and fewer specialised teaching staff are some of the common challenges for remote education systems that this statistic doesn't capture. Older students, who require teaching at a more specialised level and exposure to a dynamic way of thinking, find this to be particularly true.

This is especially pertinent in smaller communities where there are very few students at each level of education. Globally, it has been noted that there are cases where schools on outlying islands perform at lower levels than their peers on nearby more populated islands. The Outer Cook Islands and Alderney are two such examples.

On the other hand, if the pupil:teacher ratio is higher than ideal, you have to ask whether it is an area that islands have real scope to improve? In the Isle of Man where there is an average of 20 primary students per teacher, for example.

A number of Island Governments are making strategic commitments towards the recruitment of teachers, but efforts are hampered by aspects including employment licenses, a growing number of retirements due to an ageing workforce and the need to balance the number of people in skilled service industries, such as health and education, with those who work in businesses that generate wealth. On top of this, islands commonly find that they have a shortage of skilled workers within the population, including educators, and must recruit from overseas. The reality is that education services are having to work hard just to maintain their pupil:teacher ratio, let alone improve it.

TECHNOLOGY TO ADDRESS GEOGRAPHIC BARRIERS

Whether you need to deal with a high pupil:teacher ratio, or tackle some of the issues that it hides, the answers could lie in better use of technology rather than more teachers in the classroom. The examples from Tasmania, Alaska and the Caribbean show that implementing remote access to teachers, specialised staff and other students might be a smart use of resources where physically recruiting on-island is difficult or peer groups are small. The required technology is becoming more commonplace and affordable every day.

[Our research](#) demonstrates that technology is truly transformative for education in remote communities.

The pupil:teacher ratio remains a valuable measure of performance, but the impact of technology is an increasingly important aspect that also needs to be monitored.



ONLINE SHOPPING SURVEY - AVERAGE HOUSEHOLD SPEND ONLINE OVER £6000 A YEAR

In 2016, households in Guernsey, Jersey, the Isle of Man and Bermuda each spent an average of £6,000 to £7,500 online (excluding travel and package holidays and accommodation away from home) according to Island Global Research's latest survey about online shopping trends. Items asked about included clothing, food, white goods, health and recreational products and more.

The findings are fairly consistent with the 2015 results showing that online purchasing continues to be an important aspect of the retail sector.

Chris Brock, non-executive director and consultant explains "Online purchases have become a very important element in island economic and social measurement and planning. The opportunities and challenges to local businesses created by this growth are profound not only in the three Crown Dependencies but also in every other island jurisdiction worldwide."

The difference between shopping online in an island compared to a larger mainland country, is that in an island the online retailer is more likely to be based abroad somewhere like the UK, America or China. This means that more of the money spent online in an island flows directly out of the economy, rather than being reinvested in the country through local retailers. (It should be noted that mainland countries are still affected by this, but not necessarily to the same extent as an island can be.)

This is damaging for the local economy, and is not clear from the way that GDP is calculated. Online sales flowing off island still contribute to an island's GDP, rather than being considered a negative impact.

FREE DOWNLOAD: The Online Shopping Trends survey findings are available to download free from our shop - www.islandglobalresearch.com/shop

The full report includes how much households spent on different types of products, reasons respondents choose to shop online or not, what devices are most used to shop online, problems with delivery, frequency of visiting a shop to evaluate a product before buying online and vice versa.

This poses the question of how islands should respond to the hidden threat of online shopping. Here the clues are in why people choose to shop online or not.

Our online purchase trends survey reveals that convenience, price and product range are consistently the three dominant reasons for shopping online in all four islands we surveyed.* While local retailers may find it more difficult to tackle prices, this could be viewed as an opportunity for them to increase business by improving convenience and product range.

Indeed, the will of local people is there. 'I like to support local shops' was one of the top four most important reasons for not shopping online, along with issues around delivery from abroad.

This is an opportunity to think creatively about how to improve the retail offering of Guernsey, Jersey, Isle of Man, Bermuda and other islands around the world. For example, incentives to improve the online shopping and home delivery facilities that local businesses offer would allow consumers to receive a modern service in a way that benefits the local economy.

Crucially though, to know what sort of changes retailers are best to invest in, islands need to understand more about what consumers mean by convenience and choice. Further steps now need to be taken to find out in what areas islanders feel the choice of products on offer is limited, and their views on how local shopping could be made more convenient for them.

**Guernsey, Jersey & IOM: For years 2013, 2014, 2015 & 2016.
Bermuda: For years 2015 & 2016*

Data was collected online from 2000 respondents across the four islands. This is the fourth consecutive year that this survey has been undertaken and the second year that Bermuda has been included.

If you would like to find out the opinions of islanders in Guernsey, Jersey, the Isle of Man, Bermuda and a number of other locations around the world, please contact us about our [Market Research Services](#).

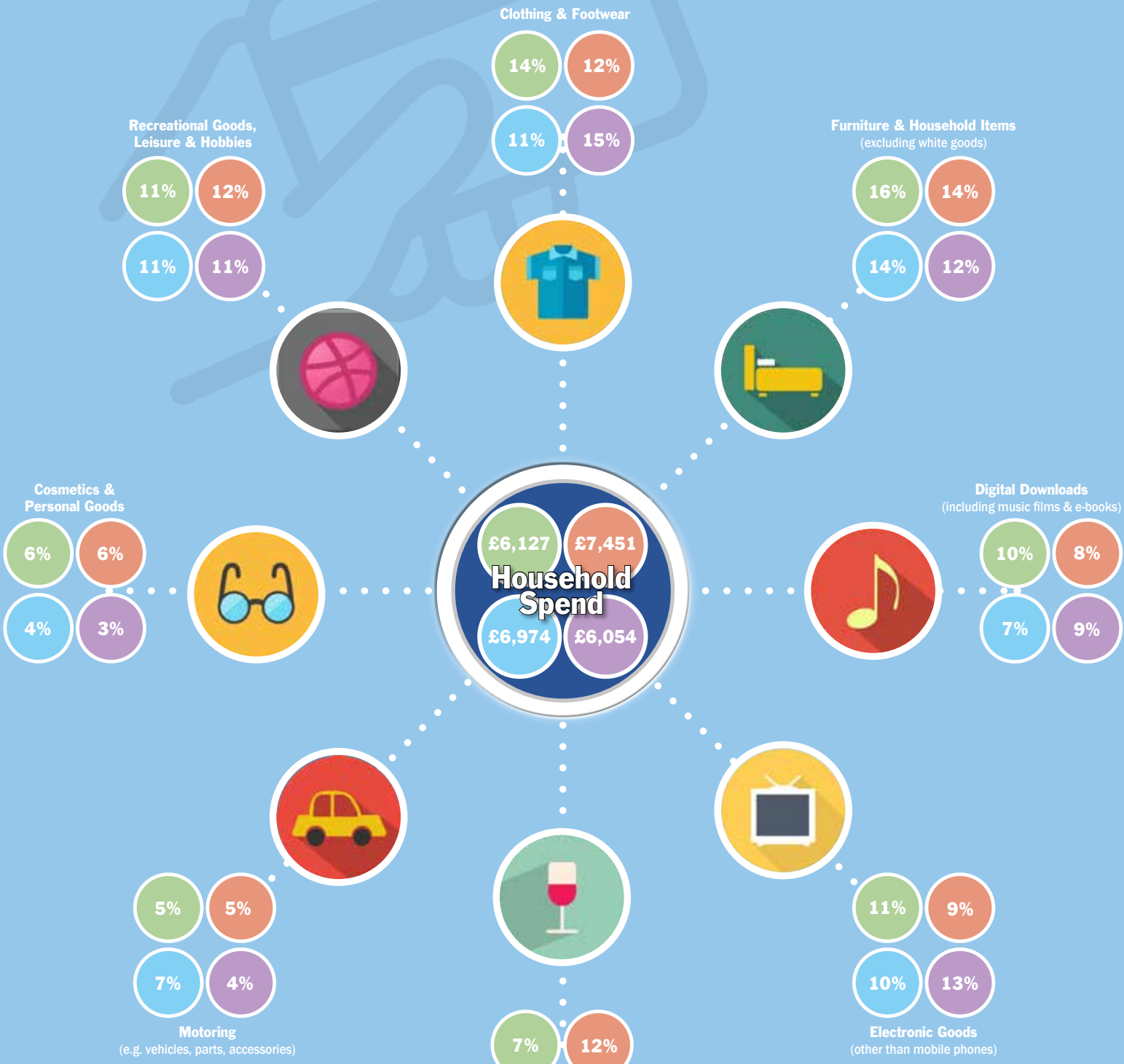
What did households spend online in 2016?

Guernsey

Jersey

IoM

Bermuda



- Average household spend online in 2016, in four islands surveyed. Total spend and breakdown on selected products shown.

Full results available to download free from: www.islandglobalresearch.com/shop

+ Travel
(Transport, Package Holidays, Hotel Accommodation)



Island Global Research Strengthens Senior Team

Island Global Research Limited (IGR) was pleased to announce a strengthening of its leadership team from 1 May 2017.

Lindsay Jefferies became managing director, taking over from Chris Brock. Lindsay, who joined the business in 2016 as deputy managing director, has extensive economic research and policy experience. Her expertise includes economic analysis of public sector initiatives, survey design and data analysis.



LINDSAY JEFFERIES

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Chris Brock, who has led IGR since it was established within the BWCI Group in 2015, will continue to develop the business and provide expertise in his new role as a non-executive director on IGR's Board.

Stephen Ainsworth, the Senior Partner of the BWCI Group, commented:

“We are enormously grateful for the major contribution that Chris has made in developing this unique consultancy and benchmarking service within the BWCI Group. We are delighted that he will continue to be part of the Board in his new role and look forward to his continuing insights. In Lindsay we have a worthy successor who will be able to bring her own wealth of experience to the role.”

Lindsay Jefferies said:

“I am delighted to take over the leadership of Island Global Research. It is an exciting opportunity and I have tremendous support to grow and develop the business. I'm looking to expand the market research and consultancy services we offer, building on my skills on economics, statistics, monitoring and evaluation and policy research. Much of my career has focused on evidence-based decision-making and undertaking research to inform strategy, guide implementation and provide insights that go beyond the statistics.”

Before joining IGR, Lindsay worked as an economist in the UK Civil Service, and then as an academic, first at Oxford University and then at the London School of Hygiene and Tropical Medicine. She studied economics at university and also has a MBA and a PhD in Health Economics. Her expertise includes economic analysis of public policy, evaluation of complex interventions to improve public services, cost-effectiveness analysis, survey design and management and data analysis. She worked internationally for many years, often in Africa and Asia. Her research included strategies to improve maternal and newborn health care in India, Ethiopia and Nigeria, changes to clinical practice for treating malaria in West Africa, and the motivation of health workers in Malawi. Lindsay moved to Guernsey with her husband and young children in 2015 to be closer to family.

Island Global Research is a research and consultancy company with a focus on islands. We understand the challenges that islands face and identify evidence-based solutions.

MARKET RESEARCH



Surveys and focus groups for public and private sector clients.

Measuring economic impact, demographic trends, attitudes and opinions, brand or product awareness, customer satisfaction, and service quality.

CONSULTANCY



Benchmarking to learn from experience in other islands.

Strategic planning to support clients in scenario analysis and project appraisal.

Monitoring and evaluation to adapt implementation and measure performance.

ISLAND MONITOR



Thematic Reports benchmarking economic, social and environmental indicators, and summarising strategies and policies.

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