Contents

01 Background and methodology
02 What does the public think of the university sector?
03 The public benefit of universities
04 Differences between devolved nations
05 Communications opportunities
06 What next?
01 Background and methodology
Project aims

Universities UK is seeking to better understand the views of the public, to inform their communications and campaigning work

As such, UUK commissioned BritainThinks to:
- Carry out research into what the public thinks of universities.
- Benchmark public sentiment towards UK universities, and level of awareness of the public benefit of universities
- Provide deep-dive qualitative insight on the drivers behind the views the public hold
- Identify the message and themes that will resonate most with the public

This slide deck is one reading of this full data set; an exploratory analysis of the perceptions of the 31% who identified as ‘neutral’ in their sentiment.
Methodology

- Short, 2 question quantitative survey of 2,000 UK adults aged 18+
- To inform qualitative recruitment, and identify ‘floating voter’ demographics – those who are not entirely opposed to universities, nor those who are advocates, as well as scale of positive/negative sentiment towards universities

- Pre-workshop online community with workshop participants
- To find out who these people are, what informs their views (channels, voices, messages)

- 8 mini deliberative workshops
- To inform participants of the benefits of universities, identify the territories that resonate with them, and develop territories to test

- Longer 8 question quantitative survey of 2,000 UK adults aged 18+
- To provide a robust benchmark of attitudes towards universities, including robust testing of the message territories, themes, spokespeople and messages designed through the qualitative phases
02 Public perceptions of universities
Generally, the public are neutral or positive towards universities

- However only one in ten – those who rated their positivity 9 or 10 on a 10 point scale- are likely to actively advocate for universities
- There is therefore a challenge for the sector to build greater positivity

Q1. Overall, how positive or negative do you feel about UK universities? Base: All UK adults (n=2063)
Where figures don’t add up to 100%, this is due to rounding

Produced for Universities UK
However, a lack of understanding of universities’ impact creates a risk that even the most positive lack ammunition to advocate for the sector.

- Only a minority say they feel informed to a great extent on any of the areas tested
  - With the knowledge gap biggest in relation to the impact on local communities
  - Perhaps unsurprisingly, those who have been to university feel more informed on each metric than those who have not

- In the workshops it was apparent that the majority of people rarely think about universities, largely finding the sector irrelevant

\[\text{“People who might not know anything about universities might not care about them.”}\]

Public workshop, Exeter

Q5. Overall, to what extent, if at all, do you feel that you are informed about the impact that universities have on...? Base: All UK adults (n=2063)
On an individual level, universities are seen primarily as a mechanism for improving employment prospects

“I don’t really talk about [going to university] now. I feel it was kind of a box that I needed to tick to get the job that I have, and now I have it, I don’t really think about it.”

Public workshop, London

“I have to get a job after this [graduation]. That’s what I’m here for. Yes, I want an education, but in order to get a job. That’s the goal.”

Public workshop, Belfast

Agreement that a university degree is only worth it if it will help you get a better job

61%

This perception profoundly shapes how participants consider the benefits – and downsides – of universities at an individual level

Q3. To what extent do you agree or disagree with each of the following statements about UK universities? Base: All UK adults (n=2063)

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And perceptions of cost dominate front of mind perceptions

Agreement that universities do not equip graduates with the skills they need to be successful in the workplace

58%

“People come in with these shiny new degrees, but the problem is that they don’t have any people skills”

Public workshop, Cardiff

Agreement that the expense of going to university outweighs the benefits of doing so

46%

“I think for her to come out with £30,000 of debt for something that she may not use in her career, I’d probably tell her not to go”

Public workshop, London

This is coupled with perceptions that universities are becoming more like commercial businesses, driven by profit

Q3. To what extent do you agree or disagree with each of the following statements about UK universities? Base: All UK adults (n=2063)

Produced for Universities UK
This shapes public opinion in three key ways:

1. Universities are becoming more elite, and inaccessible to some

2. Universities are increasingly driven by profit, rather than students’ best interests

3. A degree is not worth the expense unless it’s an essential route into a professional career

“The cost will keep going up and up and it will just be for the wealthy.”
Public workshop, London

“Universities will turn into more of a business and [students will] just go and basically buy their degree.”
Public workshop, Belfast

“You see a lot of people doing really stupid courses, like a course in Batman studies.”
Public workshop, Newcastle
The public benefit of universities
The prism through which universities are seen tends to be the undergraduate student experience

This means that postgraduate study or research is rarely front of mind; however, when presented with information about university research, the public are overwhelmingly positive about it.
Beyond this, the unprompted benefits mentioned tend to focus on the benefits on a personal level, or for the UK as a whole.

1. Pride in the sector for being one of the ‘best in the world’

2. Universities can help people ‘get on in life’ and get better jobs

3. Softer benefits experienced as a result of going to university

4. Positive impacts for local areas and communities

How positive or negative the public feel about the impact of universities on...

<table>
<thead>
<tr>
<th></th>
<th>The UK as a whole</th>
<th>Your family</th>
<th>You personally</th>
<th>Your local community</th>
</tr>
</thead>
<tbody>
<tr>
<td>NET: Negative (0-3)</td>
<td>58%</td>
<td>28%</td>
<td>4%</td>
<td>10%</td>
</tr>
<tr>
<td>NET: Neutral (4-6)</td>
<td>44%</td>
<td>34%</td>
<td>9%</td>
<td>16%</td>
</tr>
<tr>
<td>NET: Positive (7-10)</td>
<td>39%</td>
<td>33%</td>
<td>16%</td>
<td>40%</td>
</tr>
</tbody>
</table>

Q4. Overall, how positive or negative is the impact that universities have on...? Base: All UK adults (n=2063)
There is a high level of pride in the sector and belief that we have a strong global position

Agreement with statements about the role and reputation of universities

<table>
<thead>
<tr>
<th>Statement</th>
<th>Strongly agree</th>
<th>Tend to agree</th>
<th>Tend to disagree</th>
<th>Strongly disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>UK universities are globally recognised for their outstanding research</td>
<td>22%</td>
<td>51%</td>
<td>-6%</td>
<td>-2%</td>
</tr>
<tr>
<td>Universities have an important role to play in meeting the challenges the UK faces</td>
<td>21%</td>
<td>49%</td>
<td>-11%</td>
<td>-2%</td>
</tr>
<tr>
<td>UK universities are amongst the best in the world</td>
<td>20%</td>
<td>50%</td>
<td>-9%</td>
<td>-2%</td>
</tr>
</tbody>
</table>

**Implications for messaging:** There is a real opportunity for the sector to build pride and confidence in the excellence of universities. This would be particularly effective in a socio-political climate where the public are feeling vulnerable (enhanced by Brexit, and continued austerity)

**Q3. To what extent do you agree or disagree with each of the following statements about UK universities? Base: All UK adults (n=2063)**

• However, the public have little real evidence to support this, beyond pointing to iconic Oxbridge institutions.
Despite concerns about ROI, the belief that universities help people succeed and find better jobs holds

• There is an underlying belief that universities may help people to get better jobs
  • However, this is somewhat undermined by those with real experiences of university not raising their prospects

• There is still a belief that university is a valuable path to take; two thirds (66%) say that if they had children, they would encourage them to go to university

“If you want to get on with life, get educated.”
Public workshop, Coventry

Agreement that people who go to universities can get better jobs than those who don’t
55%

Implications for messaging: Highlighting the opportunities available to students, based on students’ academic ability and desired career, would support this tenacious belief, and help counter concerns about ROI

Q3. To what extent do you agree or disagree with each of the following statements about UK universities? Base: All UK adults (n=2063)
At an individual level, universities provide a space for young people to make friends for life, have new experiences and to mature...

Messages that are most effective in driving positivity towards universities: ‘soft’ benefits

- Learning something you are passionate about is one of life's great joys: universities encourage and enable this for their students
- Universities provide opportunities for people to learn throughout their lives
- At university, you can make friendships for life
- Universities help young people to grow up and to become independent, responsible adults

• Whilst these messages work well quantitatively, qualitatively responses are more mixed, with some seeing them as 'self indulgent'

• These can exacerbate feelings of elitism, particularly for low-income households, or first generation university students

**Implications for messaging:** These messages should be secondary to communications about 'harder' benefits, or those which accrue to people / communities beyond individual students

Q7. How positive or otherwise do each of the following statements make you feel about universities? Base: All UK adults (n=2063)

Produced for Universities UK
...However, to boost public positivity, the ‘softer’ benefits of university come second to research, and amidst statements on job shortages

Messages that are most effective in driving positivity towards universities: top 8 messages

- Our universities lead the world in research, such as breakthroughs in cancer and other medical treatments, and improving everyday life through new digital technology: 46% Very positive, 38% Fairly positive, -4% Not very positive, -1% Not at all positive
- The UK has a shortage of engineers, doctors and scientists; universities are essential in training these people: 43% Very positive, 36% Fairly positive, -8% Not very positive, -3% Not at all positive
- Learning something you are passionate about is one of life's great joys: universities encourage and enable this for their students: 33% Very positive, 48% Fairly positive, -7% Not very positive, -2% Not at all positive
- We need more teachers and social workers; universities are important for helping to train these people: 32% Very positive, 47% Fairly positive, -8% Not very positive, -2% Not at all positive
- At university, you can make friendships for life: 32% Very positive, 46% Fairly positive, -7% Not very positive, -2% Not at all positive
- People from all over the world choose to come to the UK to teach and to study: 30% Very positive, 48% Fairly positive, -8% Not very positive, -3% Not at all positive
- Universities provide opportunities for people to learn throughout their lives: 27% Very positive, 52% Fairly positive, -7% Not very positive, -2% Not at all positive
- Universities in the UK generate jobs for three quarters of a million people: 25% Very positive, 49% Fairly positive, -6% Not very positive, -2% Not at all positive

Q7. How positive or otherwise do each of the following statements make you feel about universities? Base: All Respondents (n=2063)
The public are less familiar with the contribution universities make to local areas, which is an opportunity for the sector

- More than half (54%) of the public agree that universities play a significant role in supporting businesses and employers locally
  - However, only one in ten (11%) strongly agree with this, indicating there is room to communicate more about this

- Examples cited in qualitative research fell into two areas, with were judged somewhat differently

- Impact on the leisure and nightlife economy, such as bars and pubs
  - This can enhance perceptions that students are generally motivated by the social aspects of university, rather than academic study
  - And can cause frustration for neighbours who are impacted by student behaviour

- The wider economic benefits of universities
  - For small businesses e.g. local shops and rental markets for small landlords
  - Partnerships with local schools
  - Industrial partnerships
  - Access to sports and culture

Q3. To what extent do you agree or disagree with each of the following statements about UK universities? Base: All UK adults (n=2063)
While the public are less familiar with the local contribution of universities, information about volunteering is well-received

- Qualitatively, the fact 725,000 students volunteered in their local community in 2014, surprised participants
- However, the public differentiate between volunteering ‘for the sake of it’ and to ‘worthwhile’ causes. Volunteering in schools and with young people is particularly well-received
  - Communicating about this could help to dispel misconceptions about what students do at university in their spare time, and help to emphasise their positive contribution to local life

“Volunteering brings benefits – you’re going to get something out of whether [the student] is building new relationships, confidence...and the community is going to get something”

Public workshop, Newcastle

Implications for messaging: Communicating both the scale of volunteering could help dispel misconceptions about what students do in their spare time, and help to emphasise their positive contributions to local life

Percentage saying that knowing that 725,000 students volunteered in their local area in 2014 makes them more positive about universities

Q7. How positive or otherwise do each of the following statements make you feel about universities? Base: All Respondents (n=2063)
Whilst not thought of spontaneously, research is seen as the single biggest benefit of universities

Messages that are most effective in driving positivity towards universities

- Our universities lead the world in research, such as breakthroughs in cancer and other medical treatments, and improving everyday life through new digital technology (20%)
- The UK has a shortage of engineers, doctors and scientists; universities are essential in training these people (16%)
- Our national economy is £73 billion better off each year because of UK universities (12%)

Showing top 3 responses, % selected (single answer option only)

Implications for messaging: There is a real opportunity to build on this positivity about research by communicating the range of research undertaken, and the impact it has for people in the UK

Q8. Which of the following makes you feel most positive about universities? Base: All UK adults who are very or fairly positive about any aspect of universities (n=1920)
Differences between devolved nations
The public’s perception of universities in the UK is broadly similar across its devolved nations, reinforcing the need for a UK-wide engagement strategy.

1. Sentiment towards universities is broadly similar across devolved nations

2. Differences in perceptions between nations highlight nuances in understanding and awareness

3. This reinforces the need for a joined up public engagement strategy
In general, sentiments towards universities are similar across the devolved nations

There is little public hostility towards the sector across the UK

Despite this, some misconceptions have permeated public consciousness
- The principal lens through which universities are seen is undergraduate teaching, rather than research
- This is irrevocably linked to perceptions of high cost, student debt and universities being commercially driven

Sharing information about the impact of the sector has a notable impact on the public’s positivity across the UK

There’s marked similarity in public perceptions of university across the constituent countries of the UK
- Strikingly, opinion is far more united than divided
- Across the board, people are neutral or positive towards universities and there is little public hostility
- Despite funding differences, debt and the cost of living are front of mind concerns for people living across the UK
Differences between national perceptions highlight nuances in opinion as opposed to strong attitudinal variation

While differences should be taken into account, they should be viewed within a context of wider consensus across the UK

- Differences in perceptions between nations are rarely statistically significant
- Despite differences in higher education systems across the UK, the attitudinal picture is far more homogenous than heterogeneous
- There is need for a UK-wide engagement strategy that captures general sentiments whilst keeping an eye on these nuances
In general, the Scottish are slightly more engaged, better informed and more positive towards universities…

**Scottish citizens (8%) are more likely to say they have been employed by a university than those in England (5%) and Wales (5%).**

**Scottish citizens (34%) are more likely to have lived near a university than those in England (26%).**

**Scottish citizens (34%) are less likely to have no relationship with universities than those in England (25%).**

**Northern Irish (36%) and Scottish citizens (36%) are more likely to have graduated from a full time university course than those in Wales (20%).**

### Positivity towards university

<table>
<thead>
<tr>
<th>Country</th>
<th>Net: Positive</th>
<th>Neutral</th>
<th>Net: Negative</th>
<th>Don't Know</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scotland</td>
<td>59%</td>
<td>24%</td>
<td>4%</td>
<td>10%</td>
</tr>
<tr>
<td>Northern Ireland</td>
<td>50%</td>
<td>32%</td>
<td>9%</td>
<td>8%</td>
</tr>
<tr>
<td>England</td>
<td>46%</td>
<td>28%</td>
<td>9%</td>
<td>13%</td>
</tr>
<tr>
<td>Wales</td>
<td>44%</td>
<td>34%</td>
<td>15%</td>
<td>10%</td>
</tr>
</tbody>
</table>

Q6. Overall, how positive or negative do you feel about UK universities? Base: all UK adults (n=2063), Scotland (n=171), Wales (n=101), Northern Ireland (61)

Q2. Please take a look at the statements below and select all that apply: Base: all UK adults (n=2063), Scotland (n=171), Wales (n=101), Northern Ireland (61)

*All differences reported are statistically significant*
...And Scottish citizens are also more likely to identify the positive impacts that universities can have on society.

In Scotland, there is more **positivity** about the impact of universities on:

*Showing: % who view the impact as **positive** overall*

| The individual: 48% | Local communities: 34% | The UK: 65% |

While in Northern Ireland, there is a greater level of **negativity** about the impact of universities on:

*Showing: % who view the impact as **negative** overall*

| The individual: 28% | Families: 14% | Local communities: 19% |

Despite this...

Scottish citizens (60%) are more likely to agree that being a graduate now is **less impressive than it was in the past** than those in England (49%).

Despite this...

Northern Irish citizens (53%) are more likely to tend to disagree that universities seem remote, out of touch and inaccessible than those in England (39%) and Wales (36%).

Q3. Please take a look at the statements below and select all that apply: Base: all UK adults (n=2063), Scotland (n=171), Wales (n=101), Northern Ireland (n=61), England (n=1730)

Q4. Overall, how positive or negative is the impact that universities have on...? Base: all UK adults (n=2063), Scotland (n=171), Wales (n=101), Northern Ireland (n=61), England (n=1730)

*All differences reported are statistically significant*
While those in Wales are more positive about messages focusing on the benefit of a degree to wages, and less about student volunteers.

Mention of higher wages for graduates is likely to be particularly effective in Wales.

- **Wales**: 75%
- **The UK**: 65%

Showing % positivity in response to: on average, those with a university degree earn £10,000 more per year than those without.

Messages about student volunteers would be less effective in Wales.

- **Wales**: 14%
- **The UK**: 8%

Showing % negativity in response to: 725,000 students volunteered in their local area in 2014.

Q6. Which of the following topic areas, if any, would you be most interested in hearing about in relation to universities? Base: all UK adults (n=2063), Scotland (n=171), Wales (n=101), Northern Ireland (n=61), England (n=1730).

Q7. How positive or otherwise do each of the following statements make you feel about universities? Base: all UK adults (n=2063), Scotland (n=171), Wales (n=101), Northern Ireland (n=61), England (n=1730).

*All differences reported are statistically significant.
04 Communications opportunities
This research indicates there is a real opportunity to build pride in, and support for, the UK’s universities
There is little public hostility towards universities

• 78% say they are positive or neutral towards universities – providing solid ground for communications activities

• Which is not to say that there are not risks to addressing some of the real challenges facing the sector – communications alone will not be enough in the context of wider public and political criticism

• But the risk of not building a positive counter-balancing narrative is far greater – and there are many positive stories to tell and engaging storytellers to carry the messages

“Universities give people the opportunity for a better life.”
Quantitative Survey Response

“British universities generally have a high perceived value for the global market, and secondly, they are a mechanism for social mobility, where people come together from all walks of life.”
Public Workshop, Margate
Sharing information drives positivity towards the sector, and similar information appeals to all audiences

Public sentiment towards universities: pre and post information being shared

<table>
<thead>
<tr>
<th></th>
<th>NET: Positive (7-10)</th>
<th>NET: Neutral (4-6)</th>
<th>NET: Negative (0-3)</th>
<th>Don't know</th>
</tr>
</thead>
<tbody>
<tr>
<td>Q1</td>
<td>48%</td>
<td>31%</td>
<td>9%</td>
<td>13%</td>
</tr>
<tr>
<td>Q9</td>
<td>61%</td>
<td>28%</td>
<td>5%</td>
<td>6%</td>
</tr>
</tbody>
</table>

- During the survey, where a range of information was shared with survey respondents, there was a significant increase in positivity across the board
  - This suggests there is a real opportunity, using multiple messages, to help shift sentiment in favour of the sector
  - And potential advocates (those who rate their positivity 9 or 10 on a 10 point scale) increase from 11% to 17%

Q1/Q9. Overall, how positive or negative do you feel about UK universities? Base: All UK adults (n=2063). Where figures don't add up to 100%, this is due to rounding
There is a broad range of areas that the public are interested in hearing about…

Area the public would be **most** interested in hearing about

*Showing % selected, top 6 responses*

<table>
<thead>
<tr>
<th>Area</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>University research leading to new medical treatments or designing new products</td>
<td>18%</td>
</tr>
<tr>
<td>How the university experience can be more affordable for everyone, including those from disadvantaged backgrounds</td>
<td>14%</td>
</tr>
<tr>
<td>The number of jobs universities create in all parts of the UK</td>
<td>9%</td>
</tr>
<tr>
<td>The personal benefits that going to university can have on someone's life</td>
<td>9%</td>
</tr>
<tr>
<td>Opportunities and support for people who wish to learn and train throughout their lives</td>
<td>8%</td>
</tr>
<tr>
<td>Career success stories from young people who have been to university</td>
<td>7%</td>
</tr>
</tbody>
</table>

…With the qualitative research suggesting that research, UK universities’ global status, and universities’ impact on local areas, and on job prospects would all play well

Q6. Which of the following topic areas, if any, would you be most interested in hearing about in relation to universities? Base: All UK adults (n=2063)
What next?

• This slide deck will be shared with UUK member institutions and published on UUK’s website
• The research findings will be used to inform UUK’s public campaigning in 2018/19
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