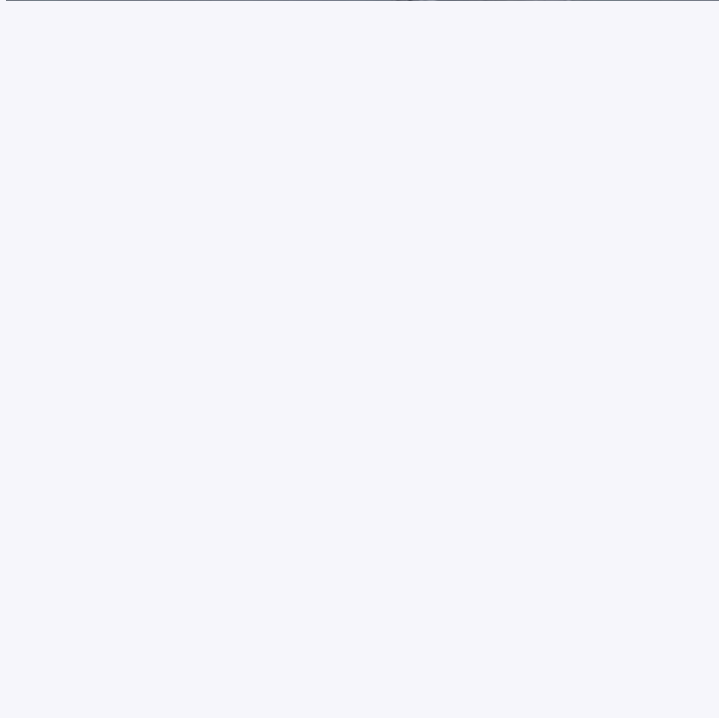
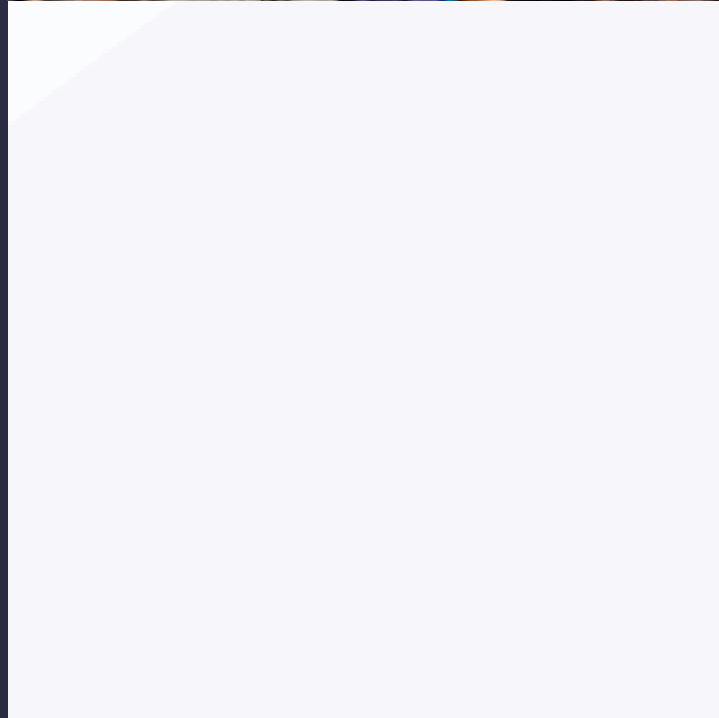
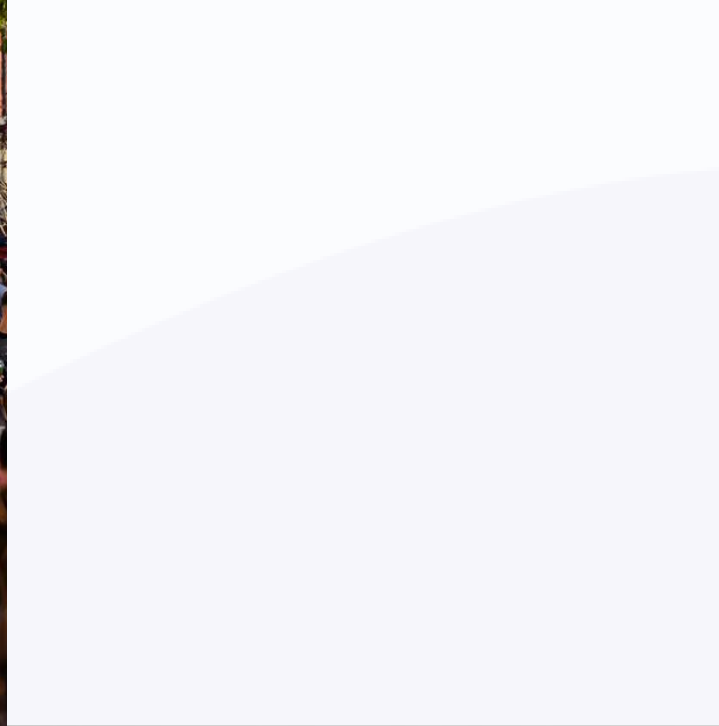




# Public Opinion

## Public Attitudes to R&D 2025





# CaSE Public Opinion

**Ben Bleasdale**

Director of Public Opinion

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# How can we help make R&D matter to more people?



**Audiences**



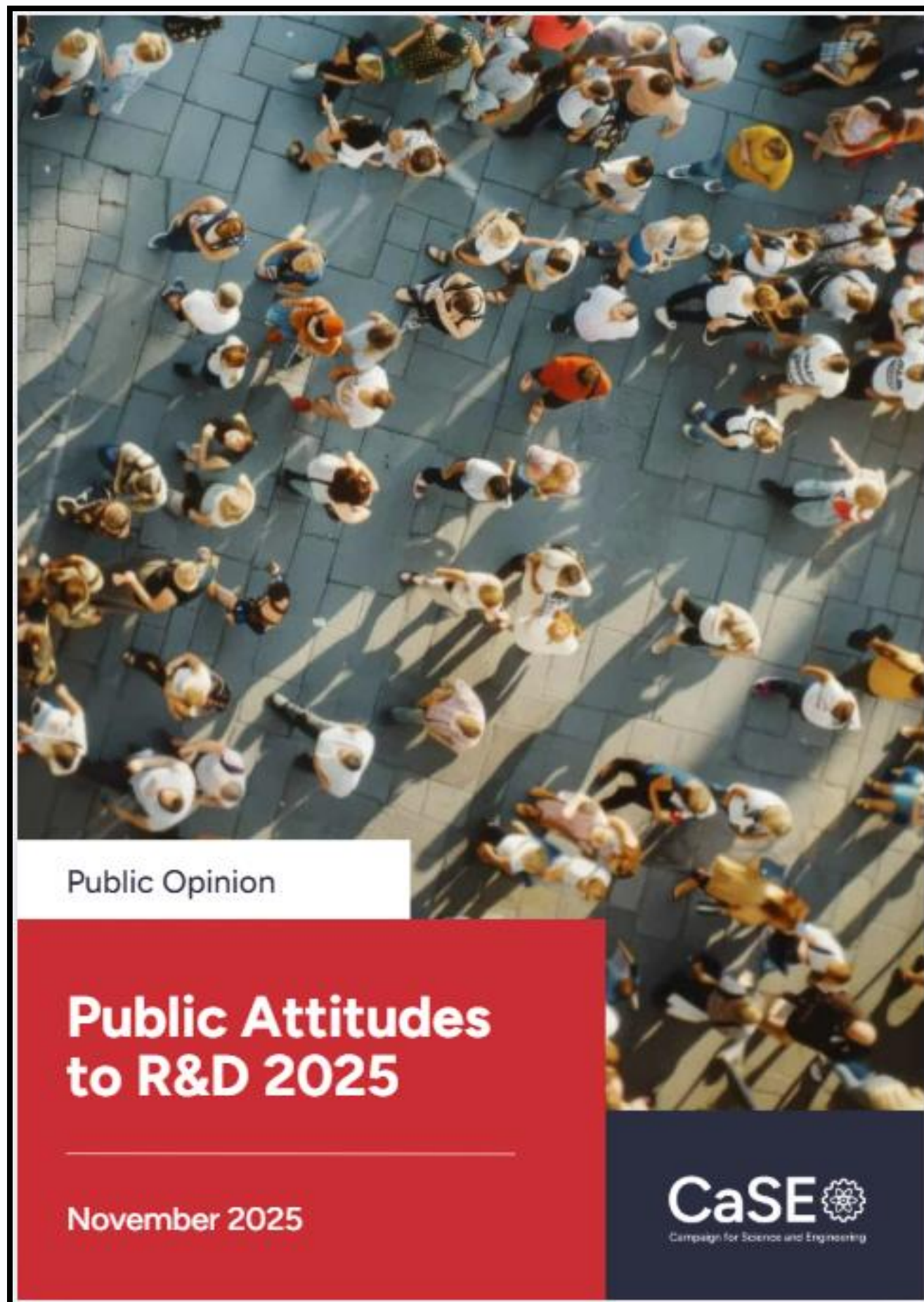
**Messages**



**Activities**



**Dialogue**



# Public Attitudes to R&D 2025

# CaSE Public Attitudes to R&D 2025

**A new, landmark study to track attitudes to R&D over time**

**Exploring:** Awareness, benefits, investment, place, engagement and trust

**Delivery:** Questionnaire design, qual research and all reporting by Icaro  
Quantitative fieldwork by Deltapoll

**Quantitative:** Nationally-representative polling of 8,000 UK adults

**Qualitative:** Eight focus groups and 20+ in-depth interviews

# Priorities and outlooks

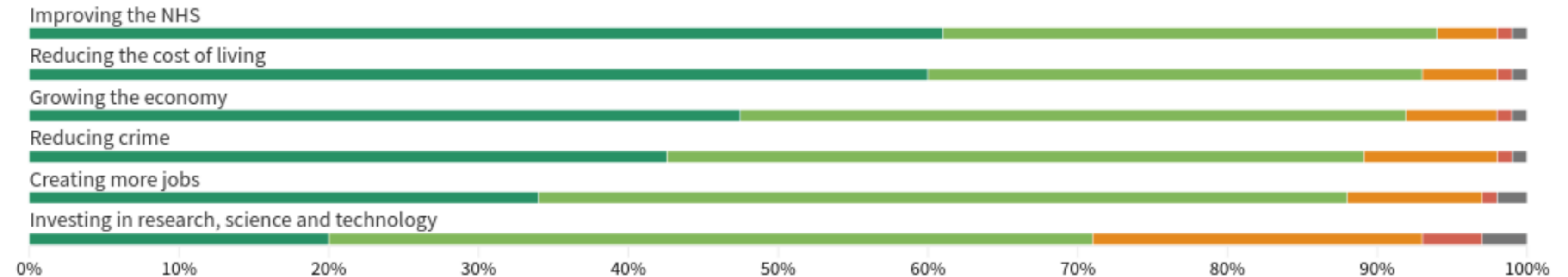
# Priority issues and outlooks

**General pessimism is high**, with 62% saying the UK is a country in decline

**Cost of living, the NHS and the economy** remain top issues

## The top five issues for the public, compared with perspective on R&D

■ Highest priority ■ Priority ■ Lower priority ■ Not a priority at all ■ Don't know / no view



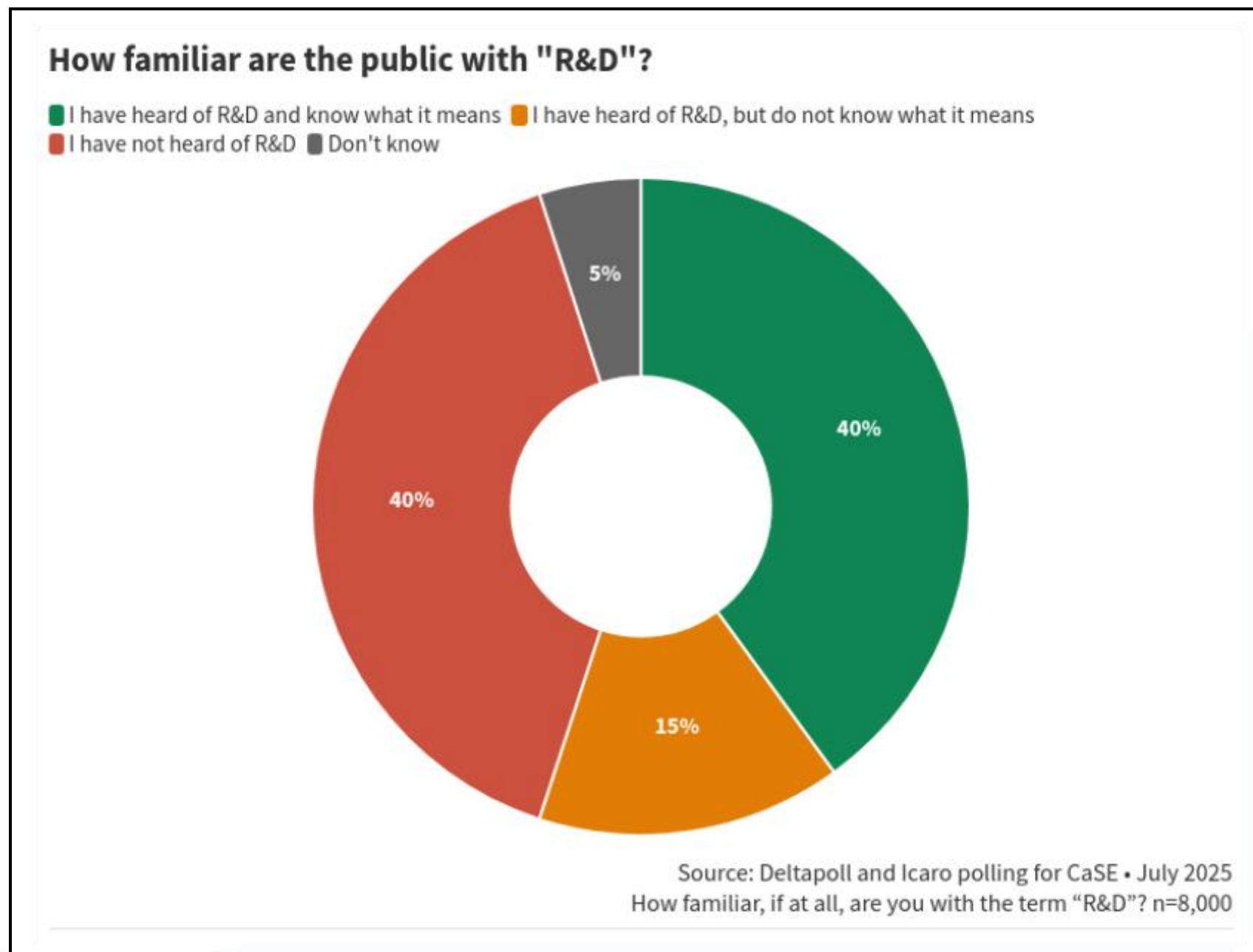
Source: Deltapoll and Icaro polling for CaSE • July 2025

How much of a priority do you think the following should be for the UK? n=8,000

# **Awareness and understanding of R&D**

# Awareness of and connection to R&D

**A majority** of people across society are aware of R&D as a concept



**"Curiosity, really. Yeah, I've always had a massive interest, mainly in science and things like that, and I follow people like Elon Musk and the Space X program. A lot of these developments, biotech, nanochips and things like that."**

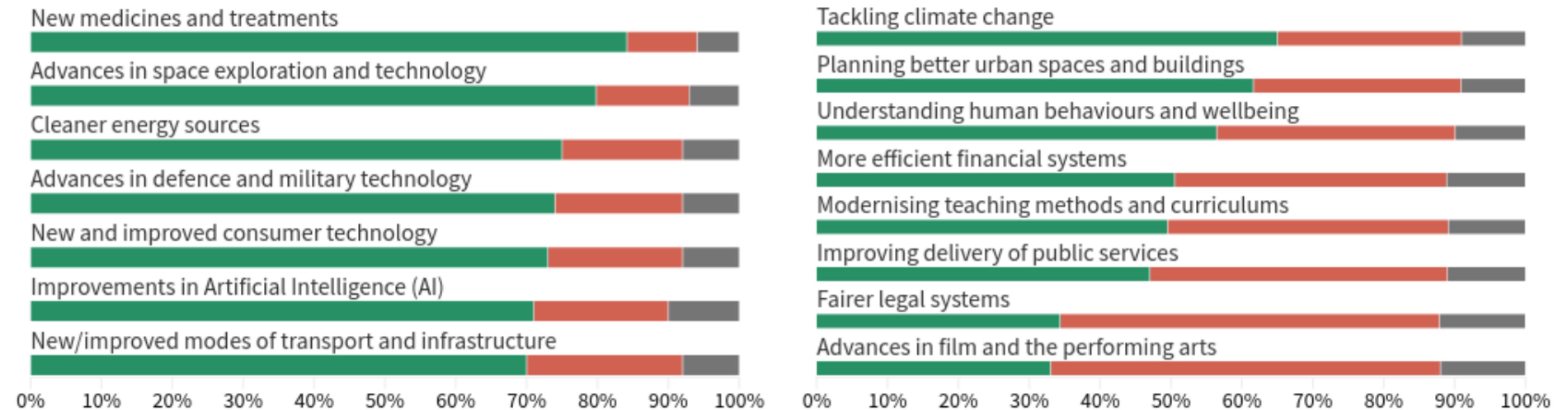
**Male, 45-54, Clacton, C2**

# Awareness of and connection to R&D

Initial associations focus on **consumer technology and medical advances**

## What areas does the public naturally associate as being R&D?

■ I would naturally think of this as R&D ■ I would not naturally think of this as R&D ■ I'm not sure

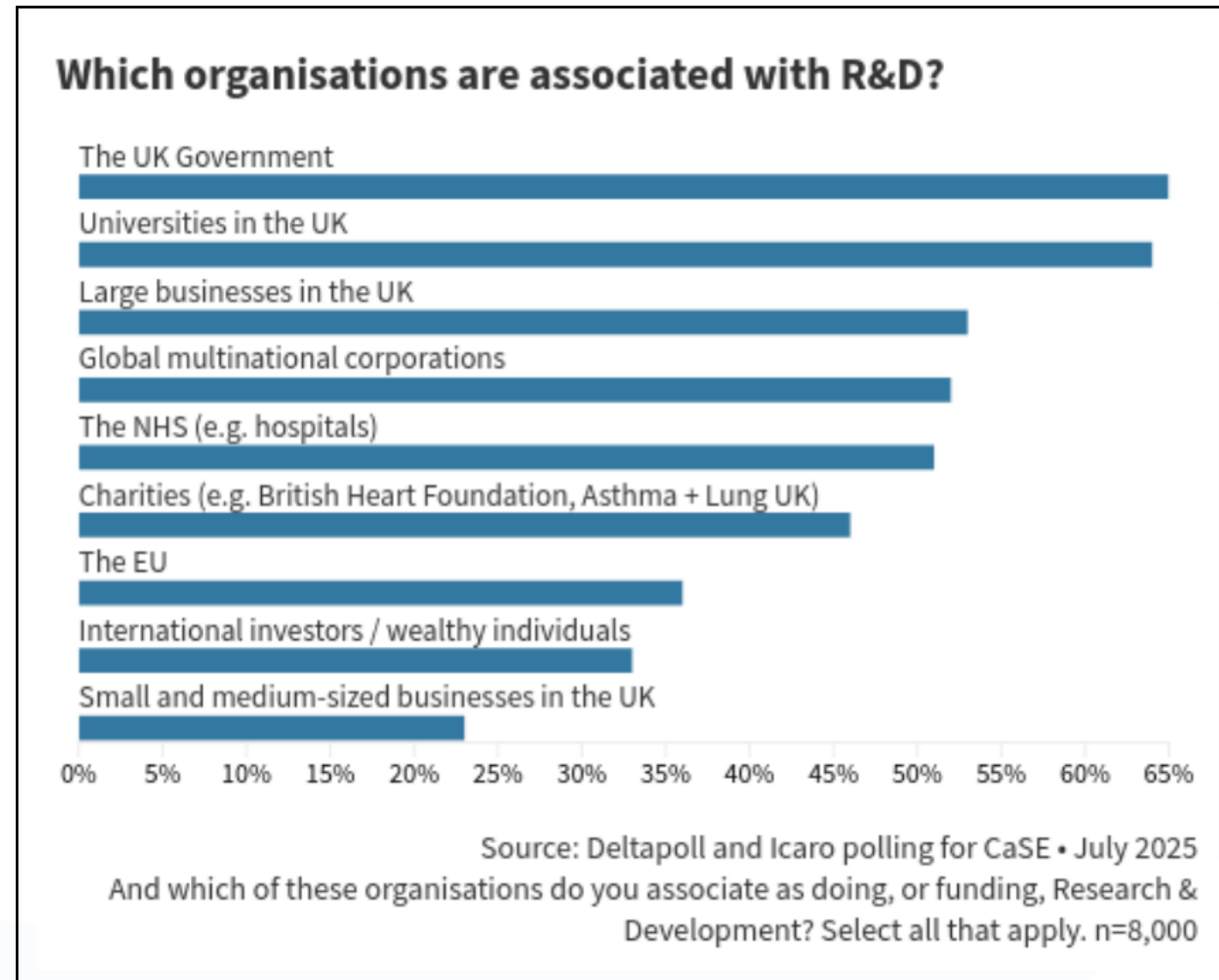


Source: Deltapoll and Icaro polling for CaSE • July 2025

Which of these things would you naturally think of as Research & Development? n=8,000

# Awareness of and connection to R&D

**Universities'** role in R&D is not front of mind unless prompted

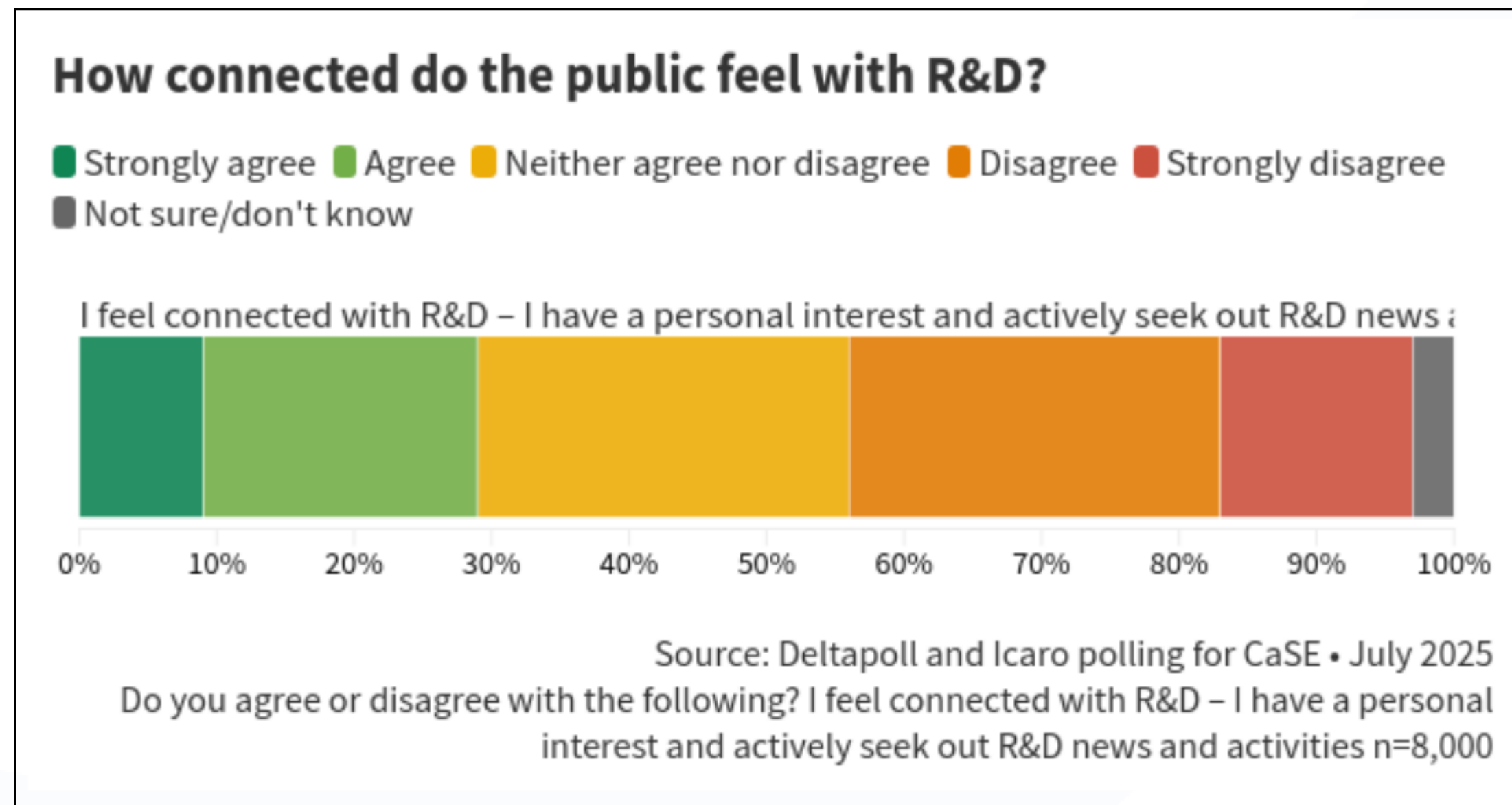


- If **prompted**, 64% associate universities with R&D
- But **unprompted**, universities rarely come up in focus groups
- R&D in universities is described as an **ancillary activity**
- Little sense of the scale of the R&D **workforce**

# Benefits of R&D

# Benefits of R&D

Just **29%** say they feel connected with R&D and only around **4 in 10** think that R&D is relevant to their life

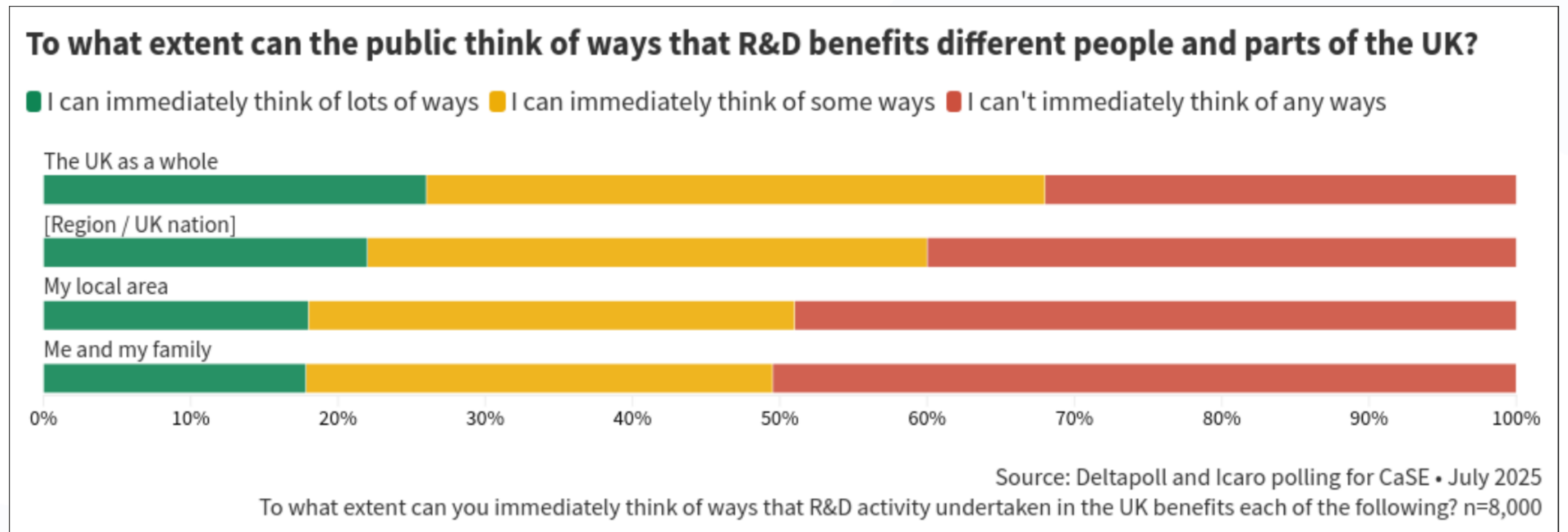


**"I struggled to connect R&D to benefits felt by 'me' - I know what R&D is, but I could not relate it to my life"**

**Female, 25-34, Clacton, C1**

# Benefits of R&D

**Less than a third** can immediately think of lots of ways that R&D benefits the UK - even fewer for their region, local area, or them and their family



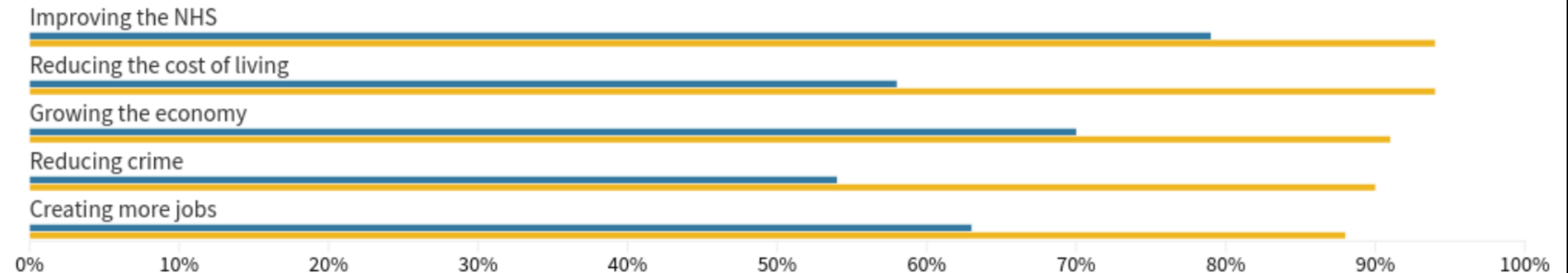
# Benefits of R&D

**67%** say Government should use R&D as a tool to solve society's problems

R&D is seen to have an **important role** in improving the NHS, climate change

## Comparison of high priority areas and R&D's role in addressing them

■ R&D has an essential or important role to play ■ Should be highest/priority for the UK



Source: Deltapoll and Icaro polling for CaSE • July 2025

How much of a priority do you think the following should be for the UK? / How much of a role do you think Research & Development has in addressing each of these issues in the UK? n=8,000

# R&D and place

## R&D and place

**Three-quarters** know nothing/hardly anything about R&D in their area, but a similar proportion would like to hear more

**“When we talked about the Wilton site with the recycling and things that were going on in Teesside University, I didn't realise things like that were happening because it's not easy to access that knowledge. So, knowing that that's there and that that would be used more locally for us, that was interesting to know.”**

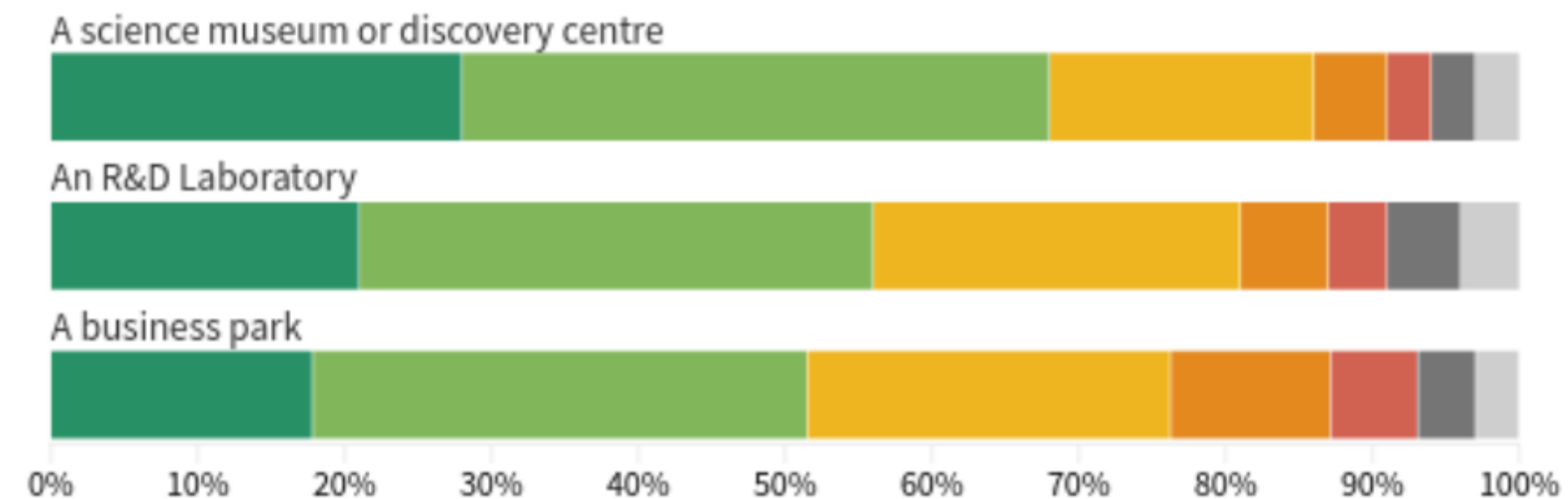
**Female, 35-44, Middlesbrough, C1**

# R&D and place

A **majority** support a new R&D laboratory or science museum in their area

How much support is there for the building of R&D facilities locally?

Strongly support Support Neither support nor oppose Oppose  
Strongly oppose Not sure No view



Source: Deltapoll and Icaro polling for CaSE • July 2025

Would you support or oppose each of the following being built in your area? n=8,000

**“So I think having more R&D taking place in my area would be great. It's more jobs, not just directly for the R&D place, like offices or whatever they are, but also all the support roles that you get with offices like this. I think it's good for high skilled jobs, which are always sought after.”**

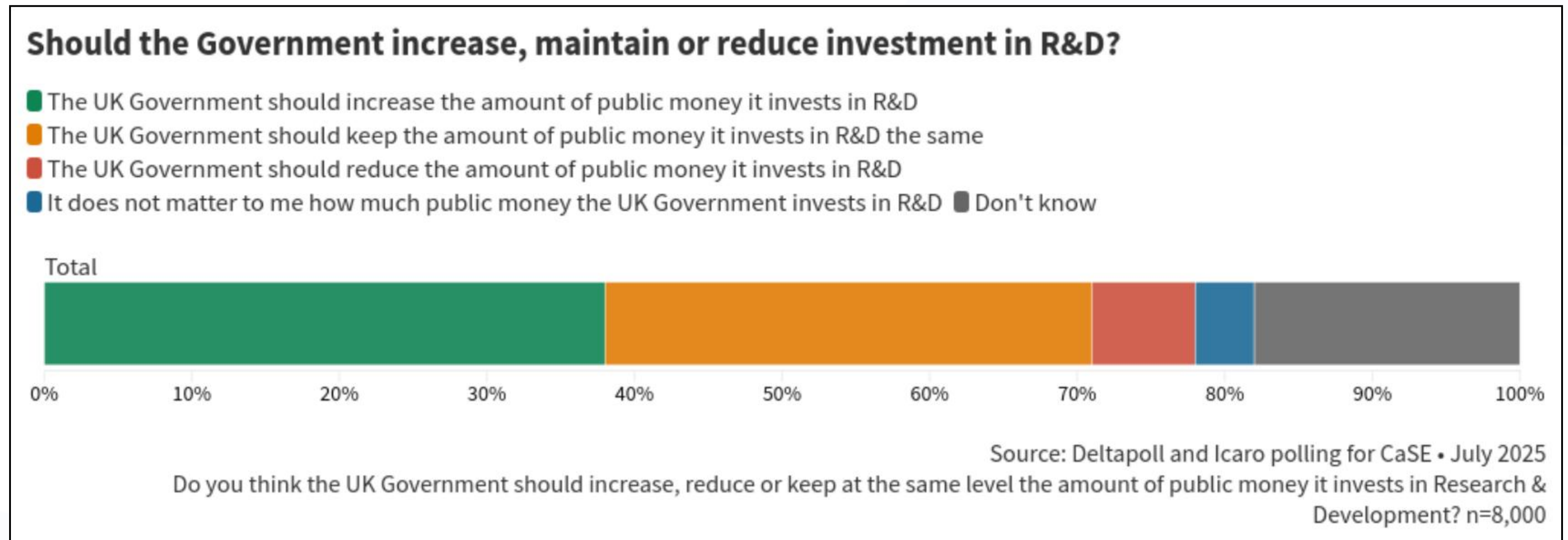
**Male, 35-44, Cardiff, AB**

# Investing in R&D

# Investing in R&D

**88%** say it's important for the UK government to invest money in R&D

**71%** want Government to increase or maintain how much it invests in R&D



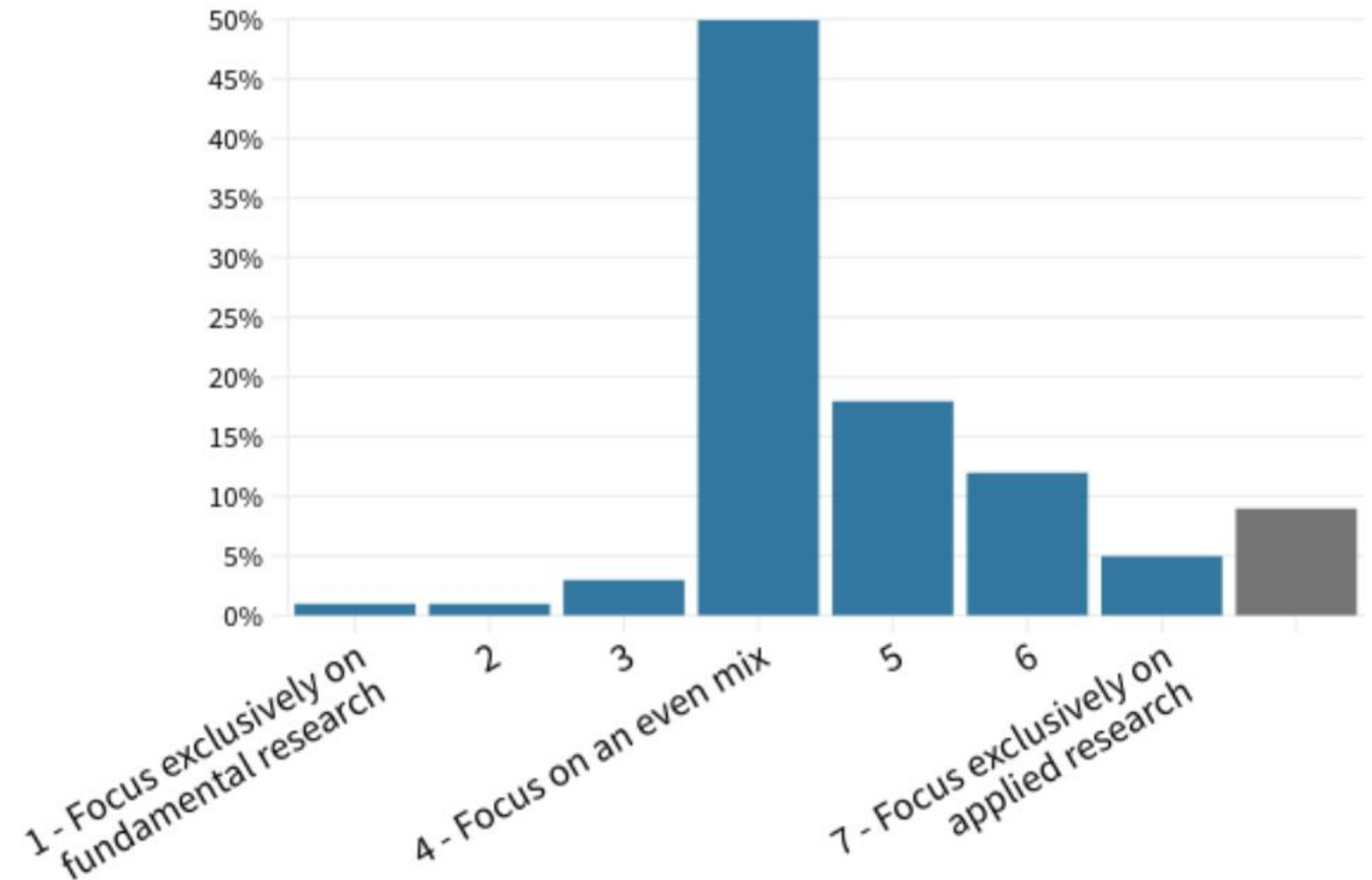
# Investing in R&D

**71%** think private sector investment has an important role in UK R&D

**Half** choose an even mix of fundamental vs applied

**Time lags** and **risk** in R&D are not an insurmountable barrier to public support

## Where do people think the balance should be between fundamental and applied R&D?



Source: Deltapoll and Icaro polling for CaSE • July 2025

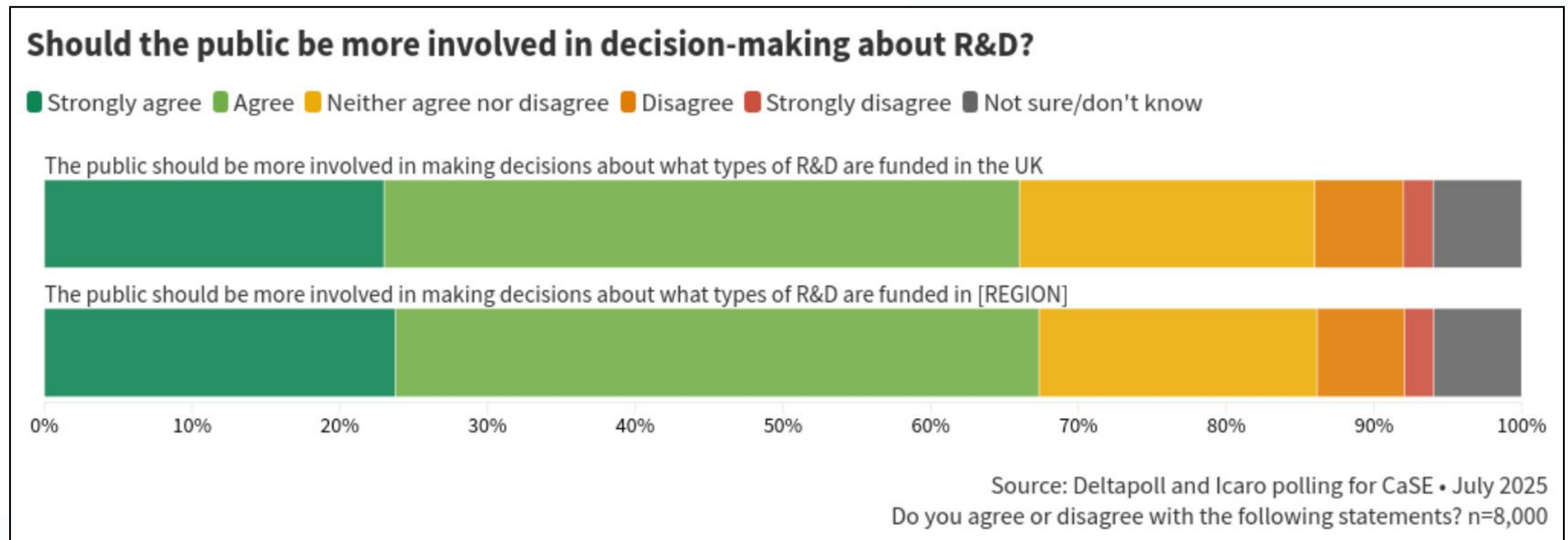
What, in your view, should be the balance between fundamental and applied research in UK Research & Development. [Definition provided] n=8,000

# **Engagement and involvement in R&D**

# Involvement and engagement

**Almost half** have done none of a list of R&D related activities in 12 months

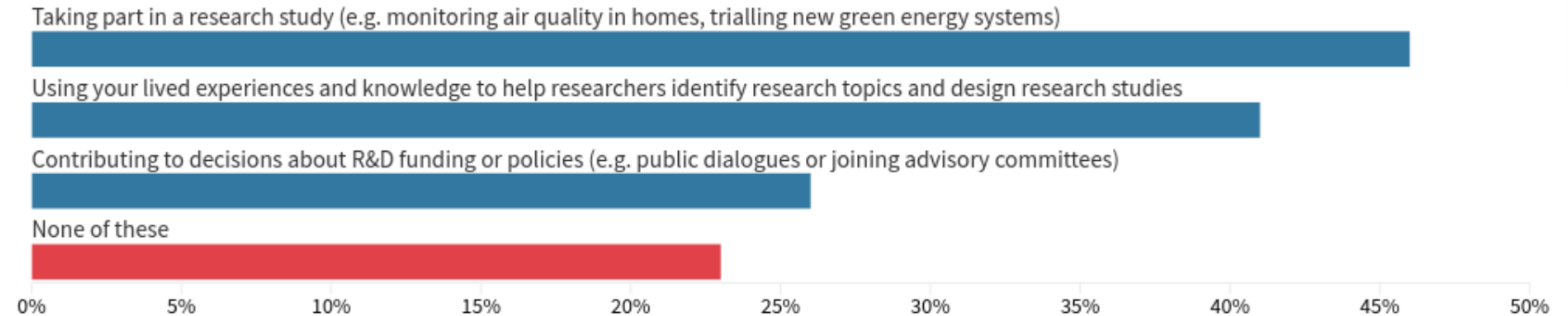
A **majority** support greater public involvement in R&D and decision-making



# Involvement and engagement

**4 in 10** would be personally interested in co-design or participation in R&D

## Are the public personally interested in involvement in R&D?



Source: Deltapoll and Icaro polling for CaSE • July 2025

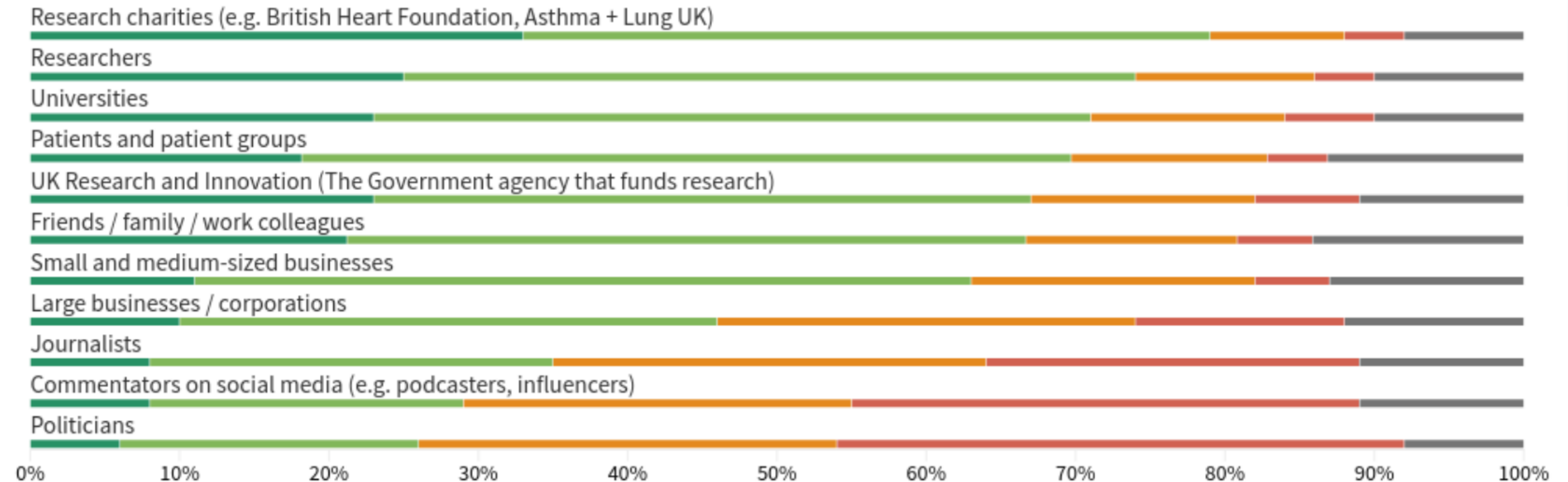
If you were offered the chance, which of the following would you personally be interested in? n=8,000

**Trust**

# Trust

## How trusted are different groups to talk about how much the Government should invest in R&D?

Very trustworthy Somewhat trustworthy Not very trustworthy Not at all trustworthy Don't know / not sure



Source: Deltapoll and Icaro polling for CaSE • July 2025

To what extent would you trust the following to be honest about how much money the UK Government should invest in R&D? n=8,000

# **Differentiators of opinion**

# Differentiators of opinion

**Demographics:** Socioeconomic group, formal education and gender are consistent differentiators of opinion

**Voting intention:** Labour and Conservative tended to be more supportive, compared with those intending to vote Reform

**Local connections and outlooks:** People who feel connected to their area and think it is doing well, and those who are aware of local R&D activity, positively influences support for R&D

# Implications

# **Implications for the R&D sector**

## **There is a sense of pessimism in the UK and the public's priorities are evolving**

- The R&D sector must consider how to remain relevant amid these shifting priorities.

## **Awareness of R&D is broadly good but knowledge of the breadth and depth of the sector is weaker**

- There is more to do to demonstrate the scale of the research workforce and champion the breadth and depth of R&D in the UK.

## **The public feels disconnected from R&D and its benefits on both a national and local level**

- The disconnect between the realities of people's lives and their perceptions of R&D's role in society will be the major barrier to gaining public support.

# Implications for the R&D sector

## **Shallow connections weaken public support for R&D - this is a risk for political buy-in**

- Political support can quickly wane and, if it does, we cannot expect an outcry from the public.

## **Place, purpose and involvement remain the most powerful connection points**

- The public show high levels of pride and interest in local R&D, want to understand the purpose of R&D, while participation can provide the public with familiarity and trust.

## **We cannot be complacent and need to act now – but we are not starting from scratch**

- We can build on the public's broad awareness and instinctive support, and the wealth of expertise in building lasting connections with the public.

# Get in touch



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