

November 2018

Universities UK

Public perceptions of UK universities

A report prepared by BritainThinks

britainthinks.com

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



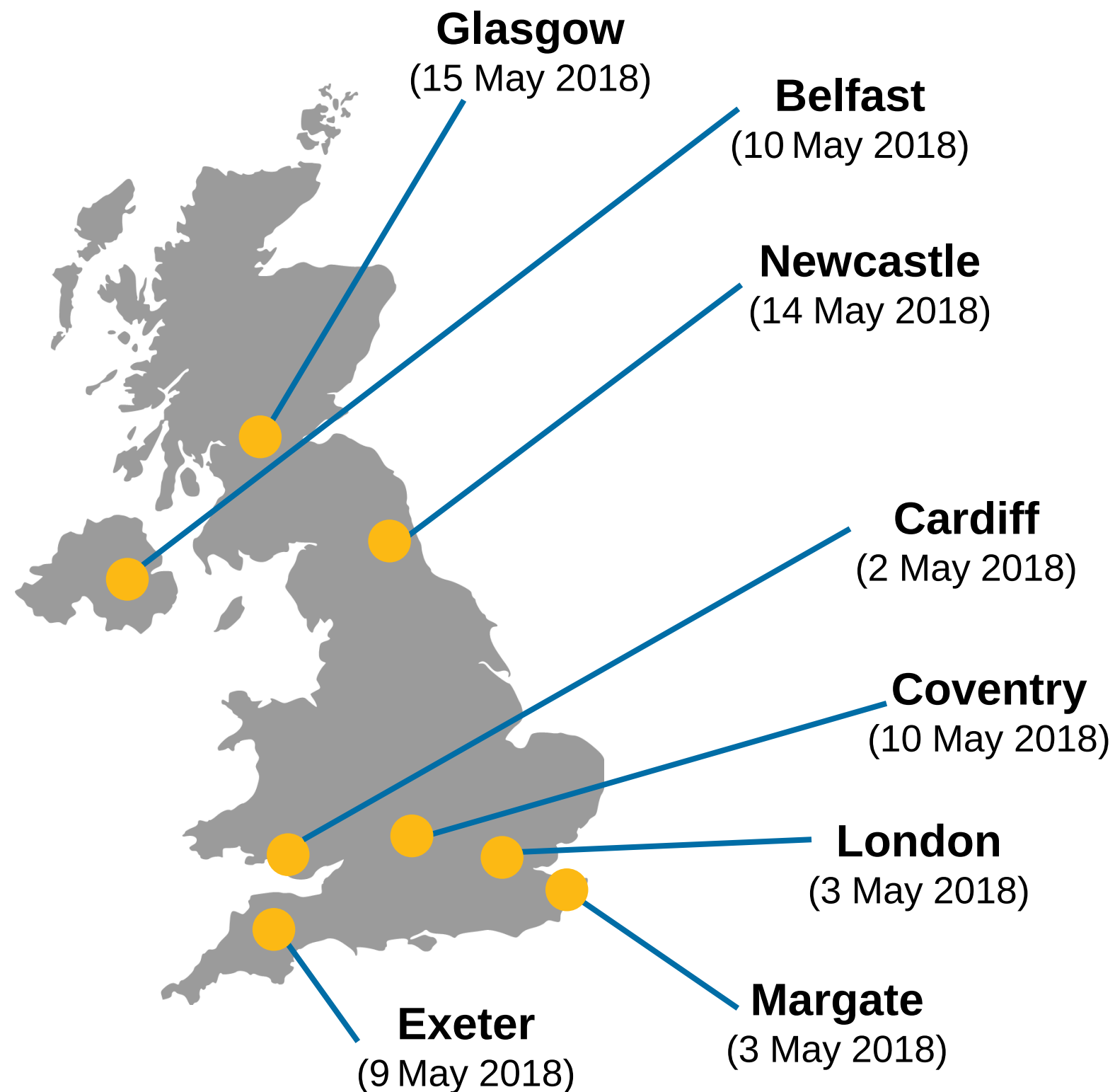
As such, UUK commissioned BritainThinks to:

- 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.

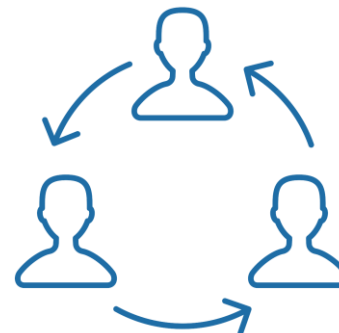
Methodology



- 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

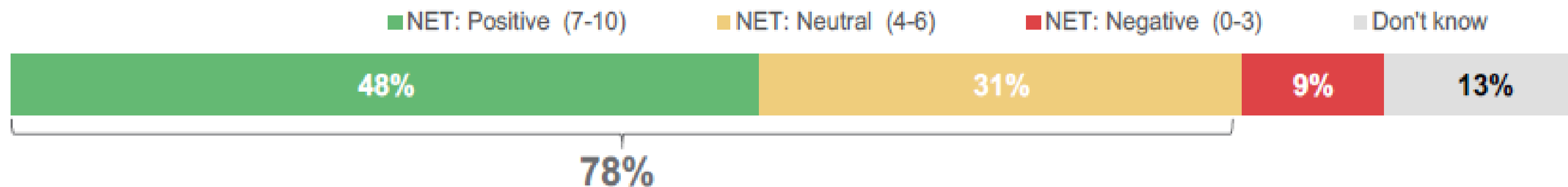


- Longer 8 question quantitative survey of 2,000 UK adults aged 18+
- To provide a robust benchmark of attitudes towards universities, including robust testing of the message territories, themes, spokespeople and messages designed through the qualitative phases

02 Public perceptions of universities

Generally, the public are neutral or positive towards universities

Public sentiment towards universities



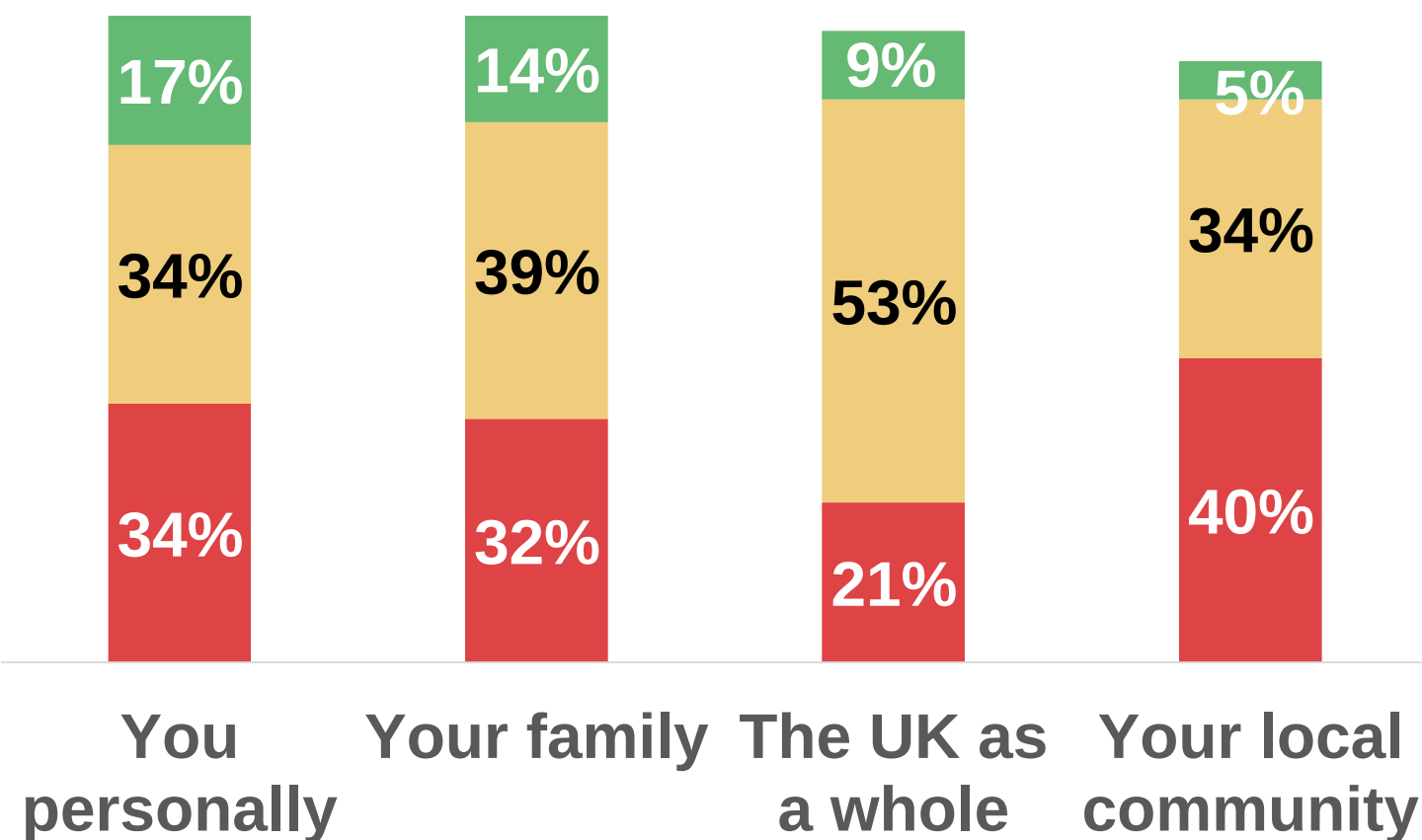
- However only one in ten – those who rated their positivity 9 or 10 on a 10 point scale- are likely to actively advocate for universities
- There is therefore a challenge for the sector to build greater positivity

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

However, a lack of understanding of universities' impact creates a risk that even the most positive lack ammunition to advocate for the sector

How informed the public feel about the impact of universities on...

■ To no extent ■ To some extent ■ To a great extent



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)

- 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

“People who might not know anything about universities might not care about them.”

Public workshop, Exeter

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



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)

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



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



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)

This shapes public opinion in three key ways:

1

Universities are becoming more elite, and inaccessible to some

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

Public workshop, London

2

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

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

Public workshop, Belfast

3

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

“You see a lot of people doing really stupid courses, like a course in Batman studies.”

Public workshop, Newcastle

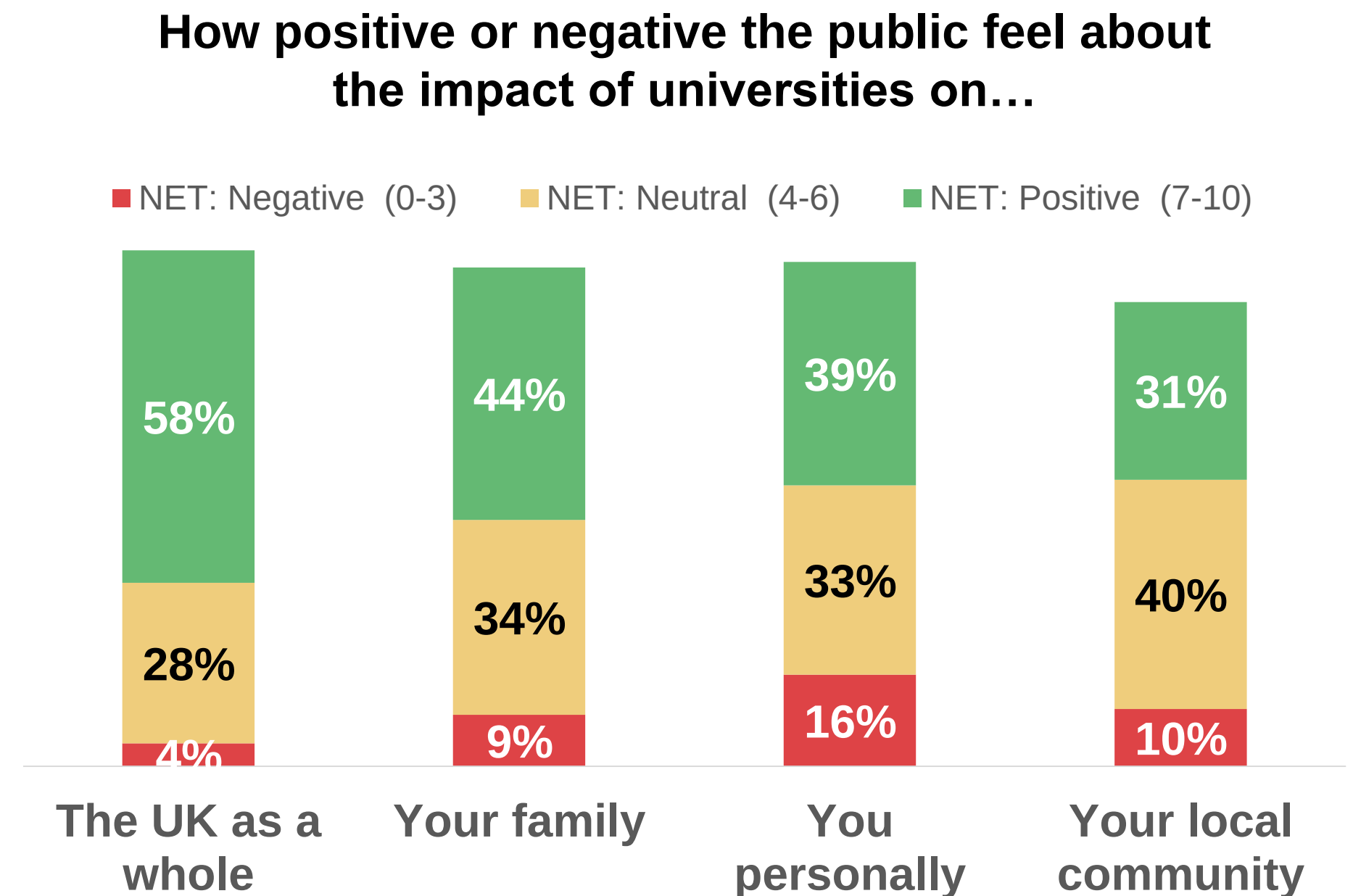
03 The public benefit of universities

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

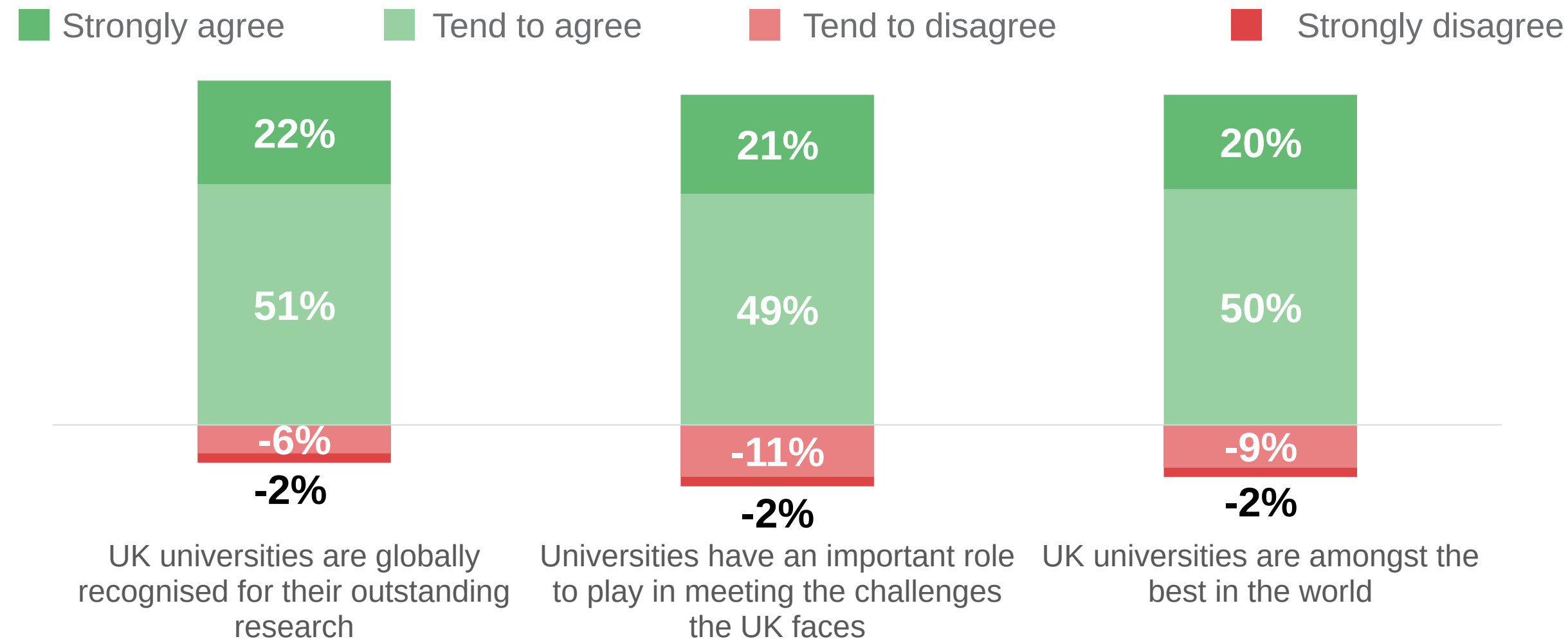
1	Pride in the sector for being one of the 'best in the world'
2	Universities can help people 'get on in life' and get better jobs
3	Softer benefits experienced as a result of going to university
4	Positive impacts for local areas and communities



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



- However, the public have little real evidence to support this, beyond pointing to iconic Oxbridge institutions

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)

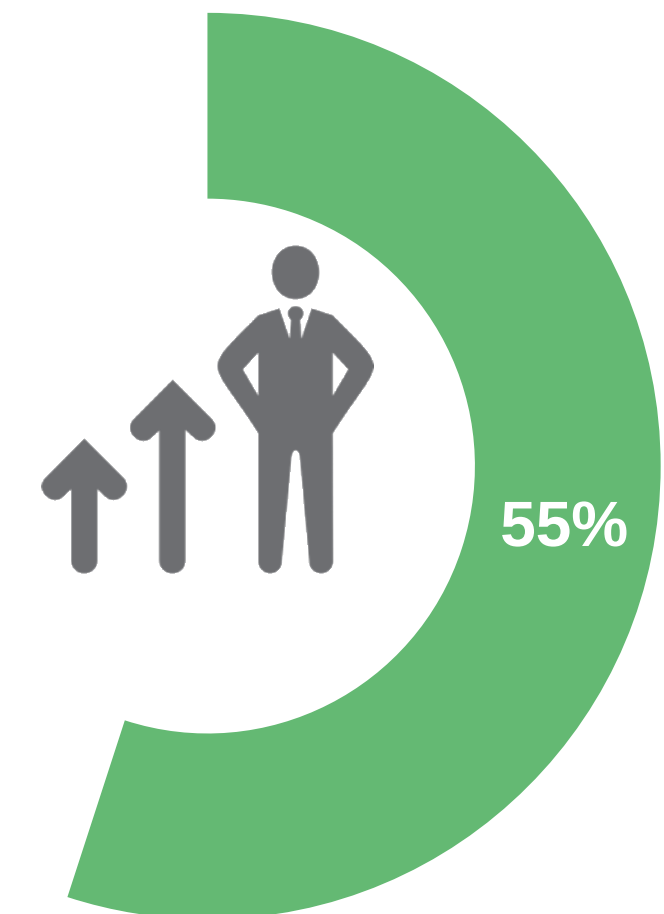
Q3. To what extent do you agree or disagree with each of the following statements about UK universities? Base: All UK adults (n=2063)

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

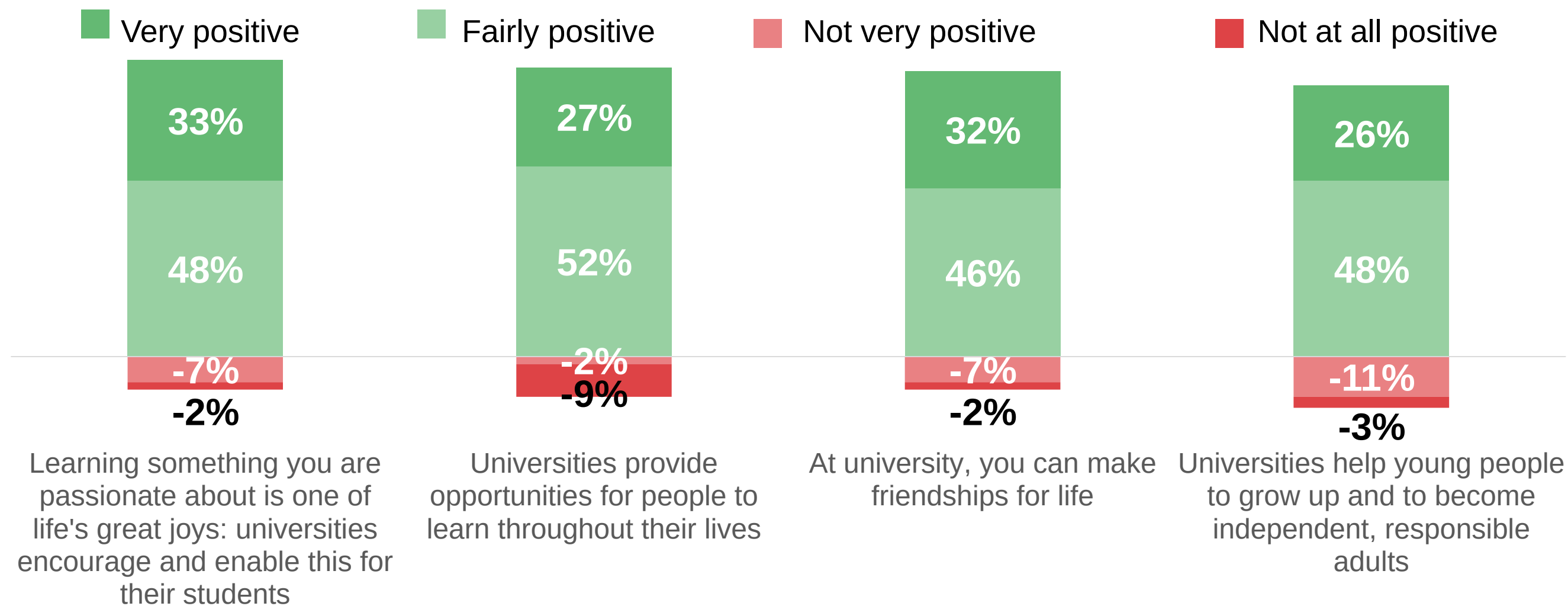


Implications for messaging: Highlighting the opportunities available to students, based on students' academic ability and desired career, would support this tenacious belief, and help counter concerns about ROI

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



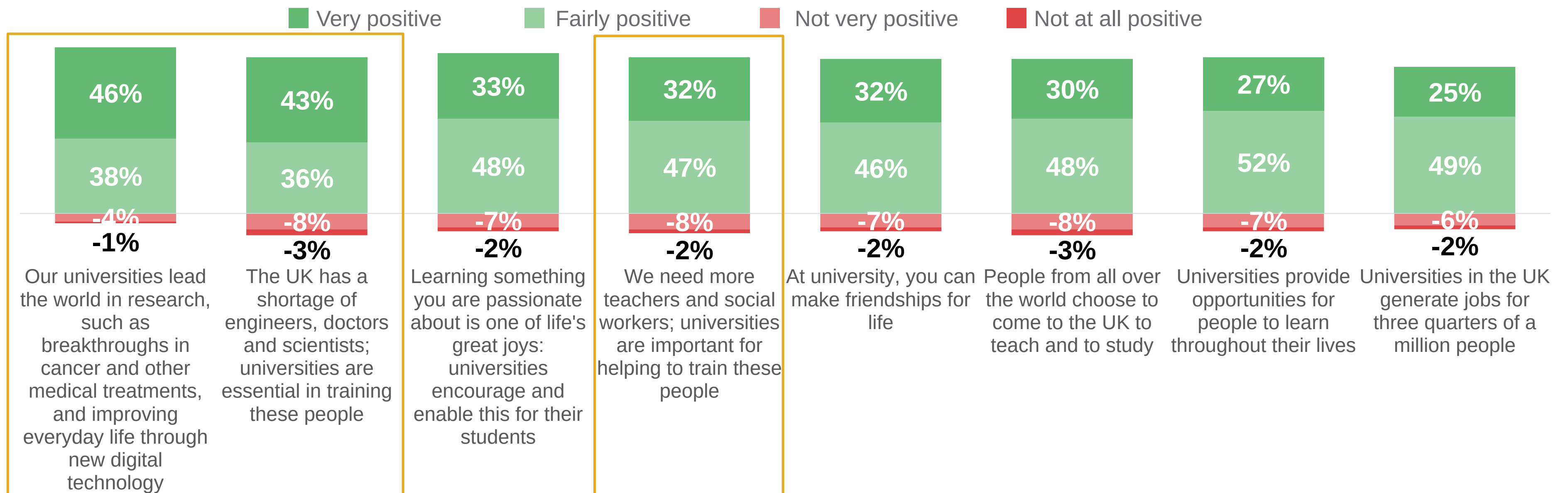
- Whilst these messages work well quantitatively, qualitatively responses are more mixed, with some seeing them as 'self indulgent'
- These can exacerbate feelings of elitism, particularly for low-income households, or first generation university students

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)

...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



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

Agreement that universities play a significant role in supporting businesses and employers locally



“Universities bring more people into the city, so it therefore brings more money, which means there is more ‘stuff’ in the city.”

Public workshop, Exeter

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

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



“Yes 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”

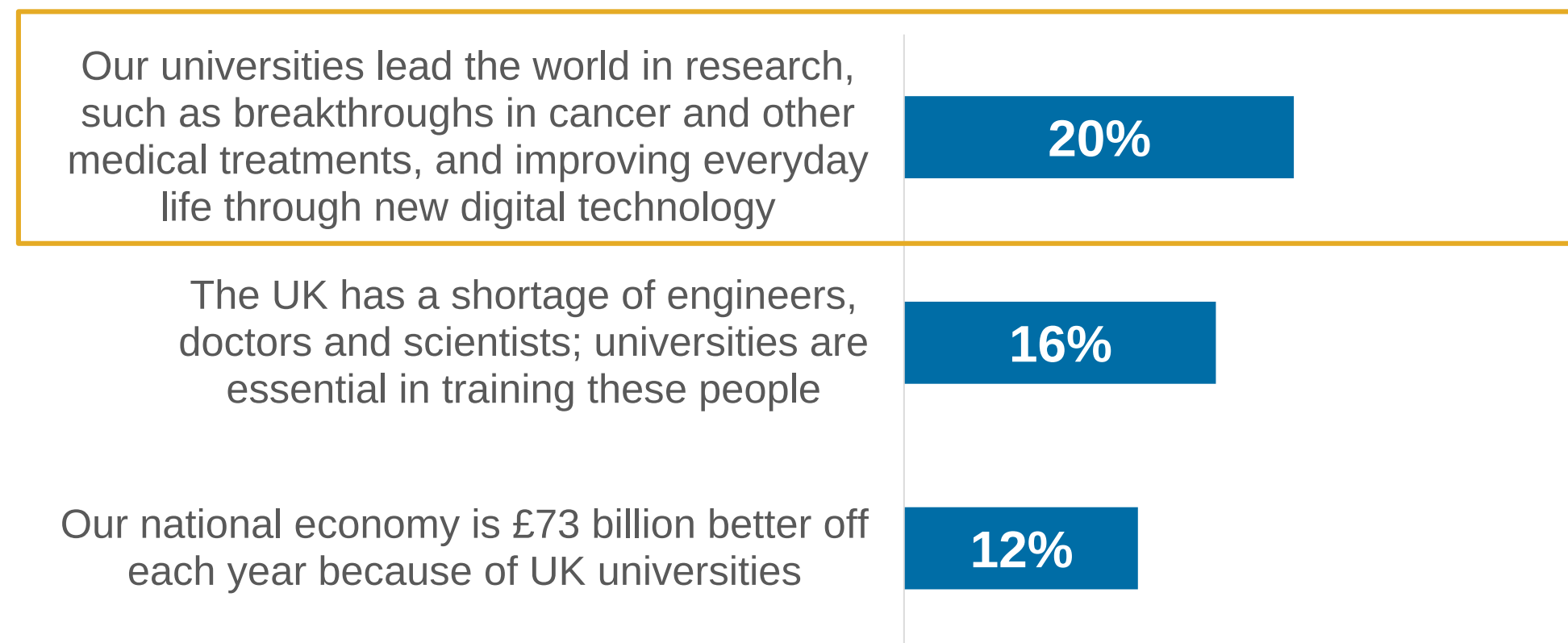
Public workshop, Newcastle

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

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



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

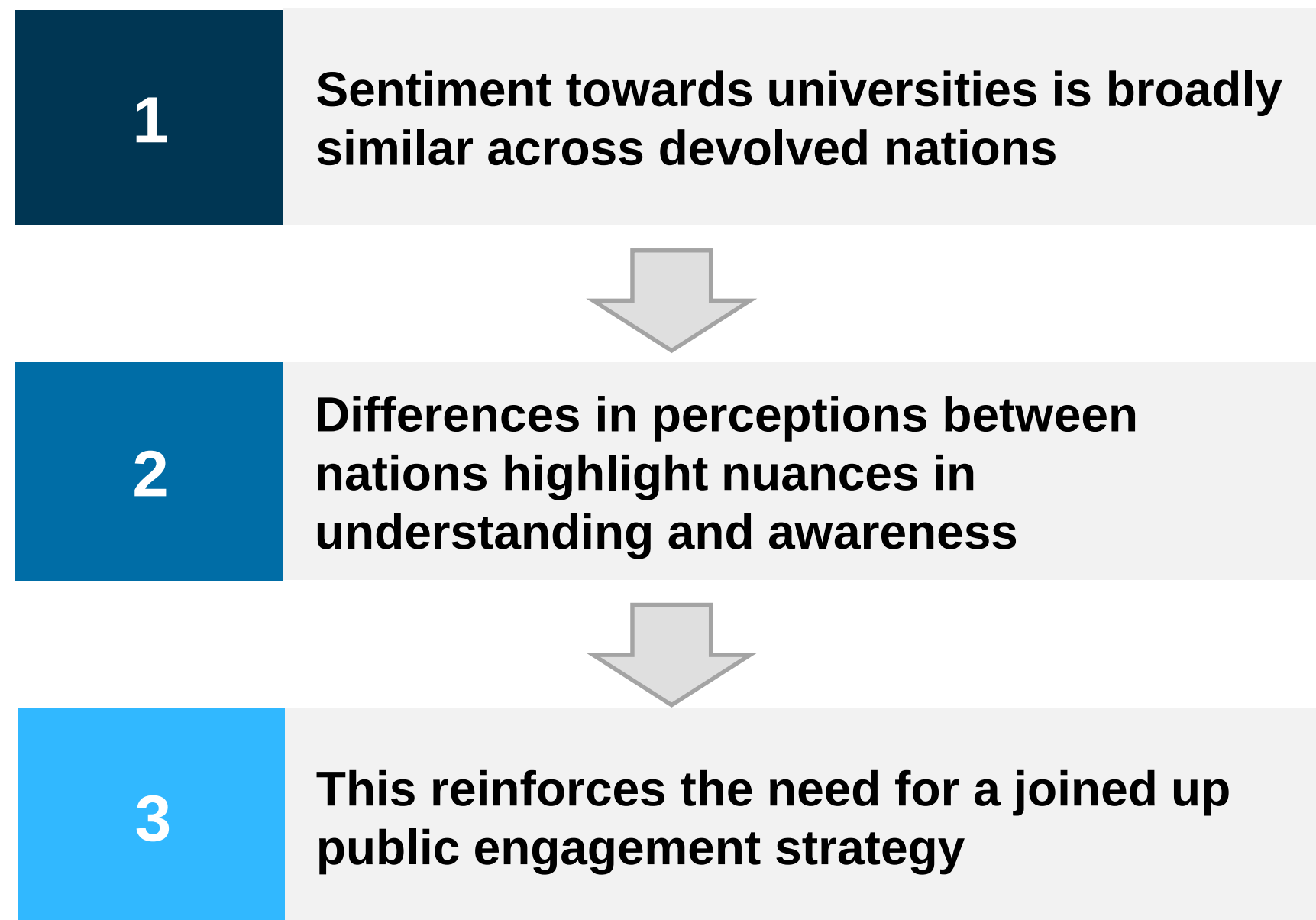
“Like the research – it’s certainly a positive thing” Public workshop, London

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)

04 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



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

Northern Ireland

Greater levels of negativity than Scotland

Scotland

Greater positivity and awareness than **other nations**

Wales

More receptive to messaging about affordability than other nations

England

More positive about the value of a degree than **Scotland**

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**

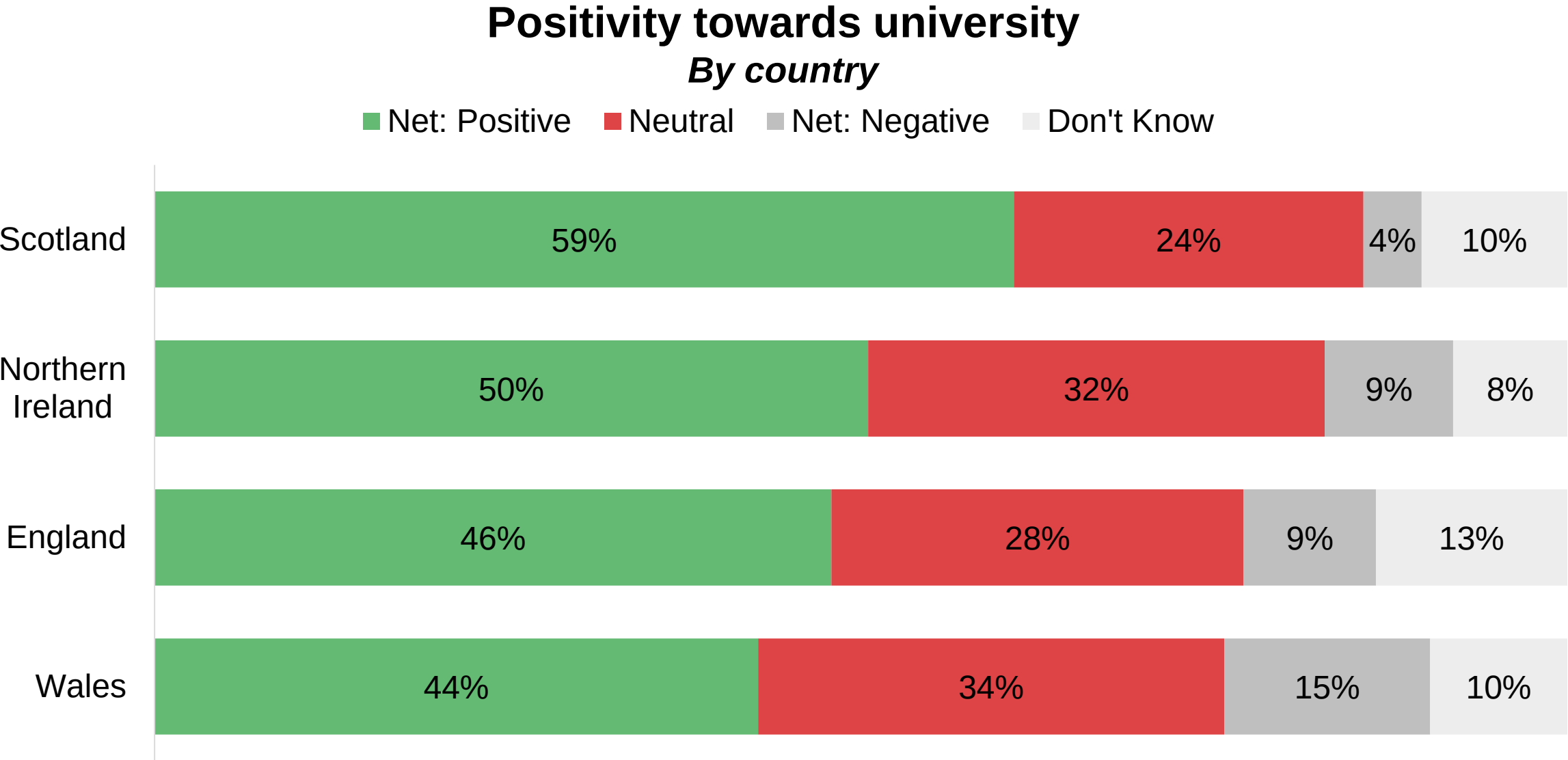
In general, the Scottish are slightly more engaged, better informed and more positive towards universities...

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%)



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)
Q6. Overall, how positive or negative do you feel about UK universities? Base: all UK adults (n=2063), England (n=1730), 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%

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%)

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...

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)

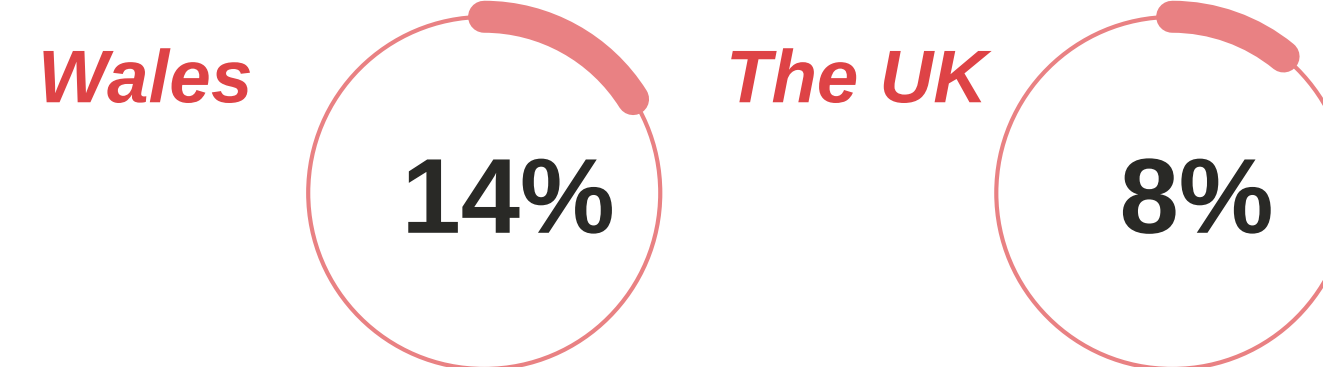
While those in Wales are more positive about messages focusing on the benefit of a degree to wages, and less about student volunteers

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



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



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)

04 Communications opportunities

This research indicates there is a real opportunity to build pride in, and support for, the UK's universities

1 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.”

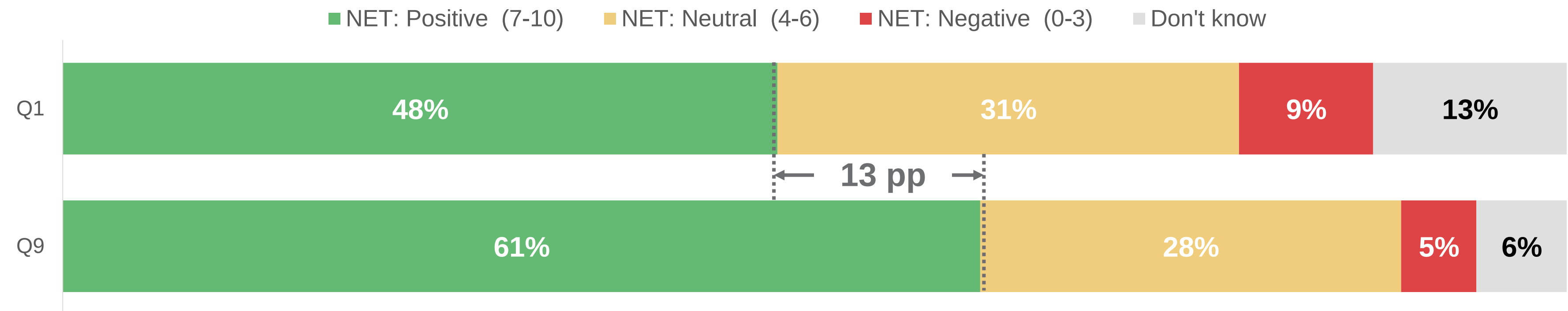
Quantitative Survey Response

“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

2 Sharing information drives positivity towards the sector, and similar information appeals to all audiences

Public sentiment towards universities: pre and post information being shared



- 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

3 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



...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)

06 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

For more information:

For more information:

Viki Cooke | vcooke@britainthinks.com

Holly Wicks | hwicks@britainthinks.com

BritainThinks
Somerset House
Strand
London
WC2R 1LA

britainthinks.com