

London Higher

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## 1 Introduction

### 1.1 Background

The UK higher education sector is diverse in regards to the number and types of institutions that offer higher education and research opportunities, the variety of organisations that are either part of or interact with the sector and the array of activities in which the HE sector is involved.

London Higher is the representative 'umbrella' organisation for universities and higher education colleges in London. It currently represents 41 publicly funded universities and higher education colleges and is one of the largest and most diverse of any similar regional university association in the UK.

While working with and alongside institutional members, London Higher also works closely with the London Development Agency to deliver a range of key projects to promote and develop London's HE cluster.

London Higher also has partnerships with the Greater London Authority, the Association of Colleges London Region and with the business sector through London First and with sponsorship from Barclays Bank plc.

London Higher is currently undertaking an 18 month project 'Social Impact by London HEIs (SILH)' examining the impacts of various community-based activities which are being undertaken by universities and colleges in London. This report examines the social impact of these community-based activities on those resident in London, whether or not universities are providing a social benefit and how usage and attitudes differ among different segments.

### 1.2 Objectives

The overall objective of the research was to assess the social impact of universities on the community as a whole and to identify whether the social impact provided any benefits. In order to do this we set sub-objectives as social impact is a complex measure that can derive via a variety of factors. The sub-objectives were as follows:

- Identify the level of awareness among respondents about HEIs in general



- Assess the level of knowledge and recognition respondents have in relation to:
  - How HEIs interact and engage with the community in terms of the services they provide
  - What universities do and how they are perceived
  - Which stakeholders they interact with and who benefits the most
- How HEIs are seen as providers of services and facilities
- Measuring and assessing level of usage and interaction of HEIs among the following 'Key Groups'
  - Children and young people (18 to 24)
  - The workforce (employment/ entrepreneurship)
  - The elderly (60+)
  - Ethnic minorities
  - Parents
  - High and low social groups
- Analysing the strengths and weaknesses of the services provided by HEIs including why they were or were not used as service provider
- Distinguishing in a broad sense 'users' and 'non-users' of HEIs services and how their level of knowledge and opinions may vary
- Identifying potential gaps that may exist in the services provided by HEIs



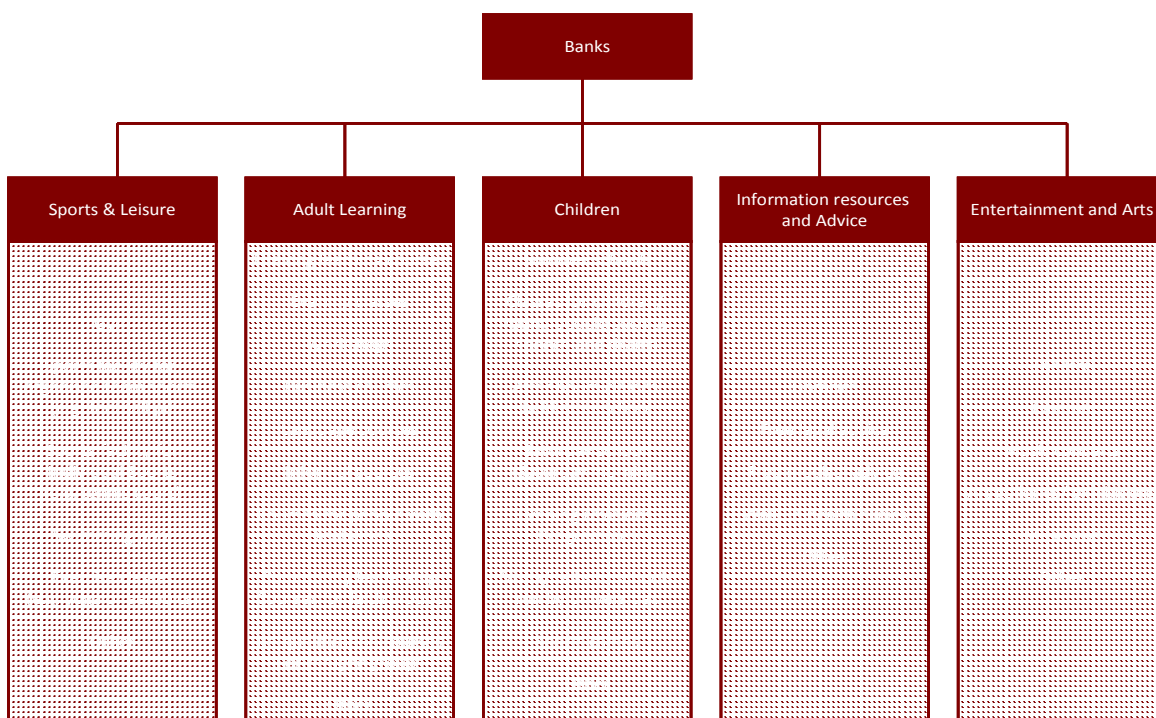
### 1.3 Social Impact – what it means and how it is measured

In the context of HEIs, the definition of social impact is the effect of HEIs on the surrounding community as a result of their actions. In a broad sense, actions refer to:

- How universities interact with the community (e.g. openness and approachability)
- What they have to offer (e.g. education, fun, sports)
- How they present what they have to offer (e.g. is what they offer clear, accessible)
- How they communicate with their surrounding community

As mentioned earlier, measurement of this is a complex issue, particularly because of the vast array of services/ facilities HEIs have to offer. As a result five main areas were identified for which HEIs provided services/ facilities and were made into banks as shown below.

**Figure 1: Services and Facilities within Banks**

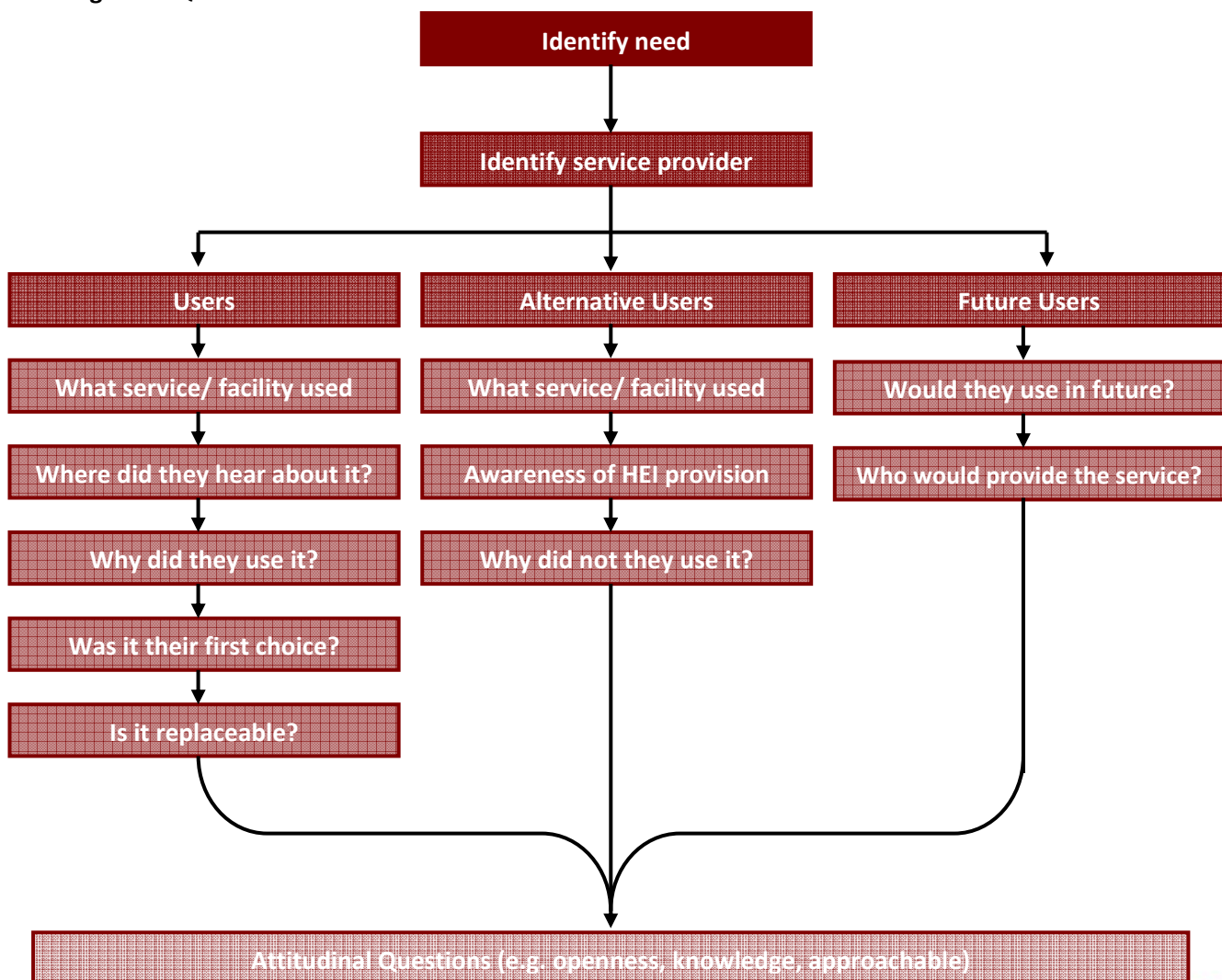


The banks were identified based on Phase 1 of the SILH project (mapping activities) which was undertaken by London Higher. The services/ facilities included in each bank were a narrower band of those identified in Phase 1 and were not set up to reflect the full range of services/ facilities provided by universities in London.

### 1.3.1 The measurement of social impact

In order to measure social impact we first identified whether or not there was a need and who provided a service/ facility to fulfill the need. The figure below is an overview of how the questionnaire was structured.

**Figure 2: Questionnaire Structure**



Once a need was identified respondents were divided into the following groups:

- **User** – respondents who used a bank service/ facility in the last 12 months and used a university
- **Alternative service users** – respondents who used a bank service/ facility in the last 12 months but had not used a university but another service provider
- **Future users** – respondents who had not used a banks service/ facility in the last 12 months but may in the future

As figure 2 shows, each group was then asked a series of questions in order to identify (i) their reasons for usage or lack of, (ii) whether the university was a substitute or their first choice, (iii) whether they would go elsewhere if the university did not provide it and for future users how likely they are to use a university as a service provider in the future.

The end section of the questionnaire consisted of attitudinal questions such as how open respondents think universities are, are they approachable and what they think about universities in their local area. Please note that local area universities were defined as universities within 20 minutes walking distance from the respondent's home. In addition, 'university' was the term used in the questionnaire and was a substitute for HEI. It was felt that respondents might understand this term better.

Overleaf is a breakdown of London Higher members.



**Table 1: Breakdown of London Higher Members**

Type	HEI
Arts/creative specialist	Central School of Speech and Drama
	Courtauld Institute of Art
	Conservatoire for Dance and Drama
	Guildhall School of Music & Drama
	University of the Arts London
	Ravensbourne College of Design and Communication
	Rose Bruford College
	Royal Academy of Music
	Royal College of Art
	Royal College of Music
Trinity Laban Conservatoire of Music and Dance	
Health specialist	Institute of Cancer Research
	London School of Hygiene & Tropical Medicine
	School of Pharmacy
	Royal Veterinary College
	St George's Hospital Medical School
Other specialist	Heythrop College
	University of London
	London Business School
	School of Oriental and African Studies
	St Mary's University College
Research-led (i.e. Russell Group)	Imperial College London
	King's College London
	University College London



		Birkbeck College
		Brunel University
		City University, London
		University of East London
		Institute of Education
		Goldsmiths College, University of London
		University of Greenwich
		Kingston University
		London Metropolitan University
		London South Bank University
		Middlesex University
		Queen Mary, University of London
		Roehampton University
		Royal Holloway, University of London
		Thames Valley University
		Open University in London
		University of Westminster
Non-research intensive mainstream HEIs		



## 1.4 Research method

The research was conducted via an online questionnaire sent out to members of the YouGov panel who were resident in London. The quota sample drawn of Londoners was representative by:

- Age
- Gender
- ABC1/C2DE social grade
- Newspaper readership
- Political party identification and
- Ethnic background

We achieved a total of 1576 respondents and the key groups fell out as shown in the table below.

**Table 2: Breakdown of Key Interest Groups**

Key Interest Groups	N	%
All Londoners	1576	-
Men	757	48
Women	819	52
Young (18 to 24)	185	12
Over 60s	279	18
ABC1	953	60
C2DE	623	40
Non Student	1489	94



Student	87	6
Working	1107	70
Not Working	469	30
White	1167	74
Non-White	409	26



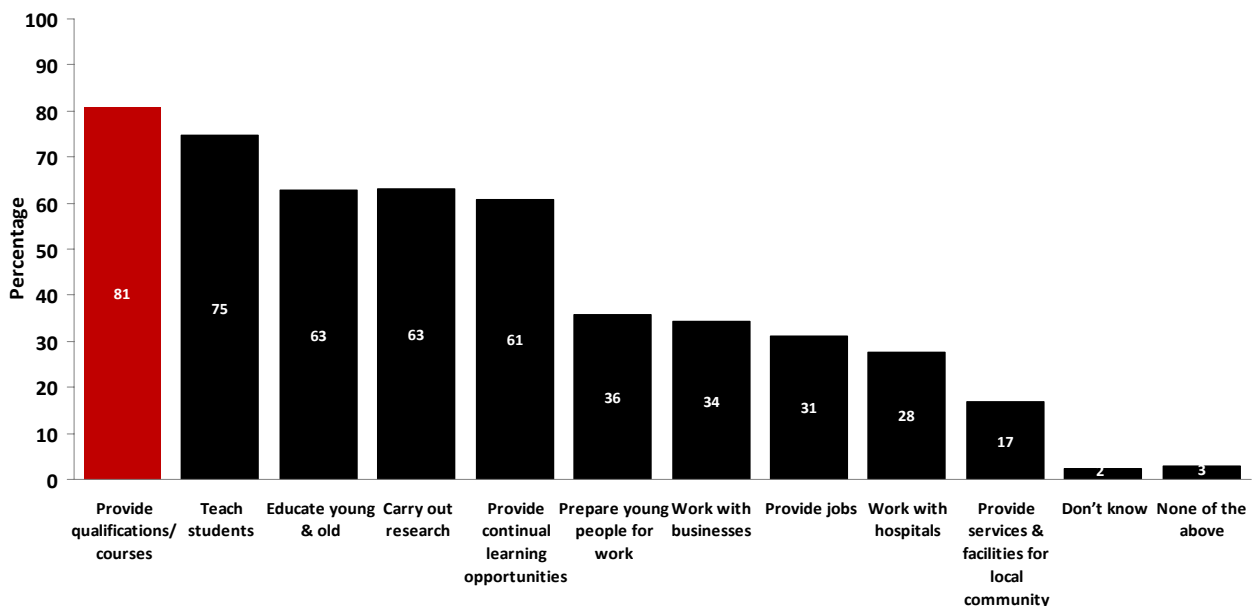
## 2 London's Universities

In this chapter we explore what universities do as a whole, how they are perceived by those resident in London and overall how they benefit society. Groups of individuals who benefit most and least will be identified as well as the key benefits which are seen to make a difference.

### 2.1 What they do

Although well-known for education, there are many areas in which universities are involved. The general notion is that universities are educational institutions providing knowledge and learning to those interested. Nonetheless, there are many other fields in which universities play a part ranging from providers of facilities to medical and environmental research.

**Figure 3: General outlook on what universities do**



Base: All Londoners (n=1576)



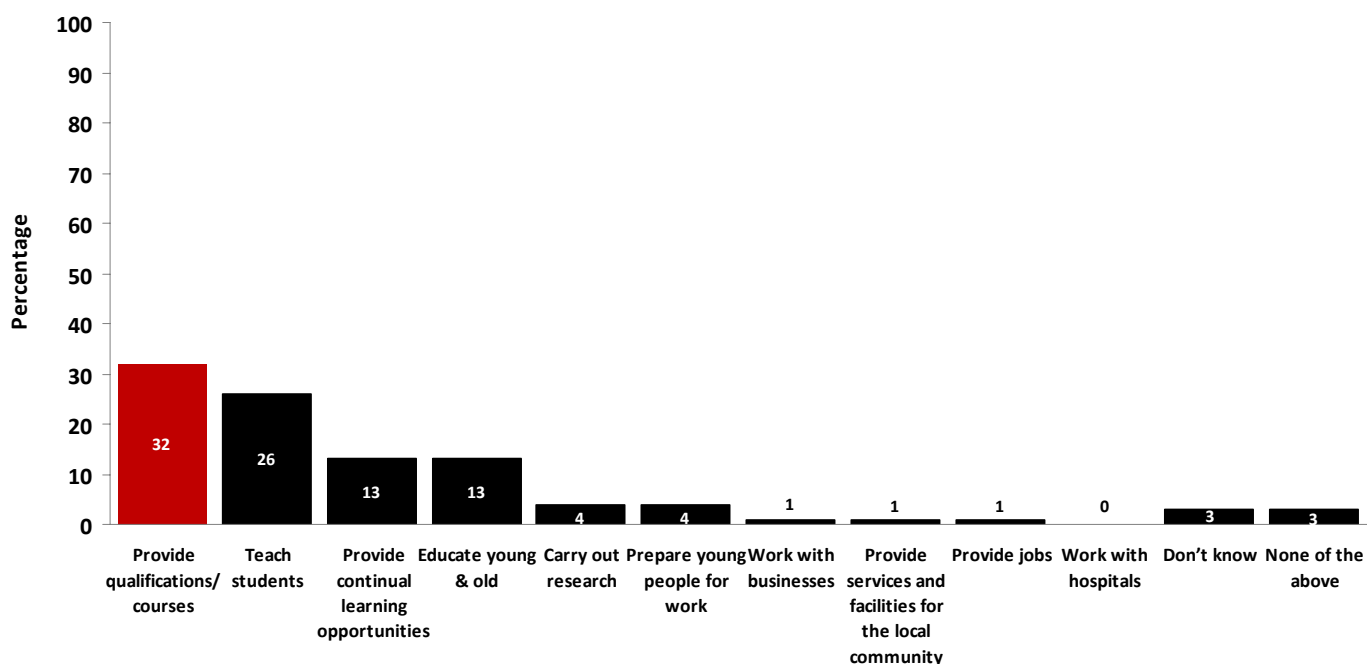
The figure above represents the perception of to what universities do. As would be expected, providing qualifications and courses is at the top of their list with 81 per cent stating this, followed by teaching students (75 per cent) and educating the old and young (63 per cent).

Universities are also well recognised for the research they carry out (63 per cent) and continual learning (61 per cent). They are more likely to be recognised as providers of continual learning opportunities by higher social classes than lower (63 per cent ABC1 compared to 57 percent C2DE) and could perhaps be an indication that the educational opportunities available are not as apparent, or widely accessible, to those from lower social groups. The cost of learning could also be a factor – the cost of continual learning may be perceived as too high and the value of its benefits too low for group C2DE to consider and as a result, is not something they associate with universities.

Universities as institutions offering more than education, is a perception held by few among the population. Approximately one third of Londoners recognise universities as providers of jobs (31 per cent) and as organisations who work with businesses (34 per cent). Further down the list is their association and interaction with the local community with one in six (17 per cent) recognising universities as providers of services and facilities for the local community. It seems however; that this is a benefit recognised more by younger people aged 18 to 24 (22 per cent) than older people aged 60+ (12 per cent).



**Figure 4: What best describes what universities do**



Base: All Londoners (n=1576)

When respondents were asked what best describes what universities do, a similar pattern existed. Providing qualifications/ courses was at the top of the list (32 per cent) followed by teaching students (26 per cent). Nonetheless, providing continual learning moved further up the list with 13 per cent stating this. As figure 4 above shows, being well-known as providers of jobs and facilities is not something the universities pursue.

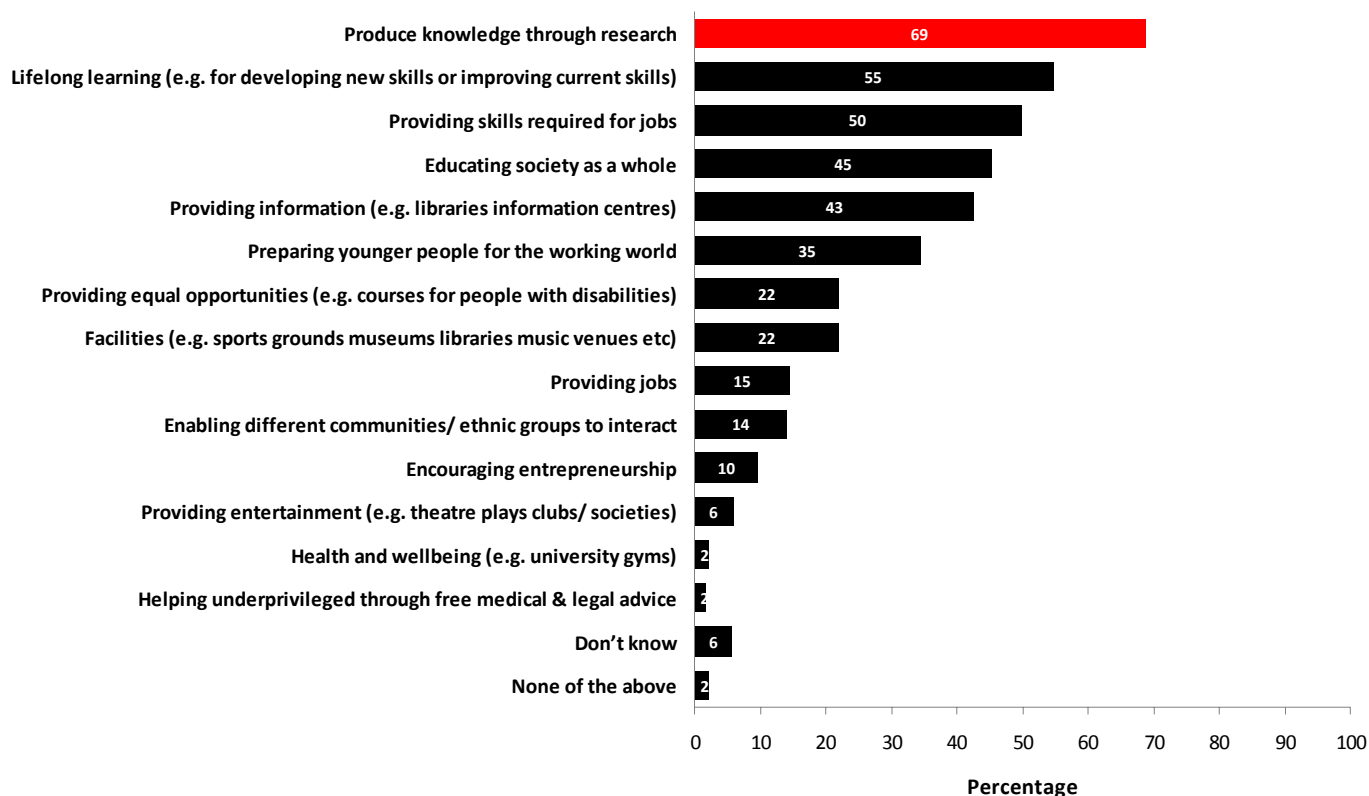
## 2.2 How universities benefit society

To measure the social impact of universities it is firstly important to identify not only how society as a whole perceives them but what benefits they believe universities provide. Respondents were asked to



identify five ways in which universities benefit society and the figure overleaf shows how some of the benefits scored.

**Figure 5: Benefits provide by universities**



Base: All Londoners (n=1576)

Despite being strongly associated with education and teaching, it is the research carried out by universities that Londoners feel provide the most benefit (69 per cent). Lifelong learning is the second most popular benefit (55 per cent); however this seems to be more of a benefit to those in the social group ABC1 (58 per cent) than social group C2DE (50 per cent). As would be expected lifelong learning is perceived as more of a benefit to older people than young with 57 per cent of those aged 60+ stating this compared to 48 per cent of young people (aged 18 to 24).



Although providing jobs was not strongly associated with universities in terms of what they do, half of the respondents (50 per cent) recognised that as institutions providing skills for jobs they are a benefit to society. Employment and entrepreneurship was one of the key areas of interest and figures indicate that Londoners are aware of the skills provided by universities – the link between provision of career skills and universities is clearly visible.

One in five Londoners recognise the benefit of universities as providers of facilities whether this is in the shape of a sports ground or a museum. As a catalyst to encourage community interaction, it seems universities fall short with only 14 per cent stating ‘enabling different communities to interact’ as a benefit.

Difference of opinion does not just exist among the old and the young; it also exists among men and women. The table below shows a gender breakdown of universities top five benefits to society.

**Table 3: Gender comparison of top five ways in which universities benefit society**

Benefit	Men	Benefit	Women
	%		%
Produce knowledge through research	71	Produce knowledge through research	67
Providing skills required for jobs	53	Lifelong learning	60
Educating society as a whole	49	Providing skills required for jobs	47
Lifelong learning	49	Providing information (e.g. libraries)	44
Providing information (e.g. libraries)	42	Educating society as a whole	42
<b>Base</b>	<b>757</b>		<b>819</b>

For both men and women, producing knowledge through research is at the top of their list. For women, Lifelong learning is the second most important benefit provided by universities (60 per cent ) but for men it is providing skills required for jobs (53 per cent ).



Educating society as a whole is perceived to be more beneficial by men than women. For men it ranks third (49 per cent) and for women it ranks fifth (42 per cent). Women feel universities are more beneficial as providers of information than men with 44 per cent stating this. Similarly this is also an important benefit for the non-white population with half indicating 'educating society as a whole' as a benefit.

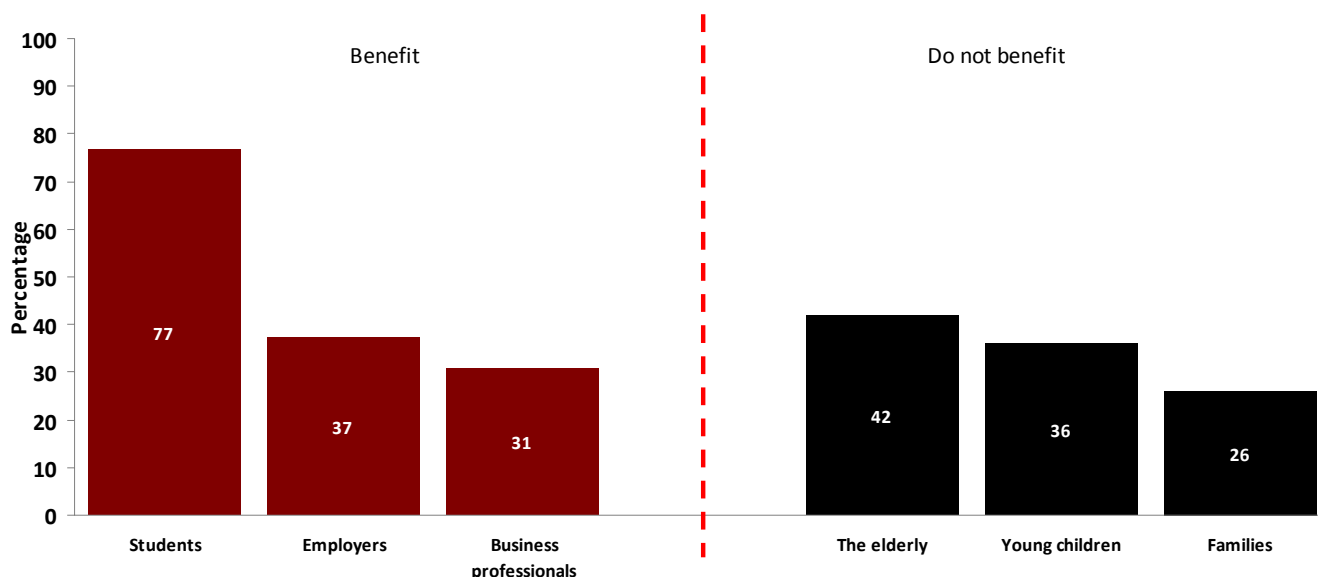
Now that we have identified the benefits provided by universities, the second step is to identify who benefits and this will be discussed in the next section of this chapter.

### **2.3 Who benefits from universities?**

Respondents were asked to identify which individuals they believed benefited the most and the least from the services/ facilities provided by universities. As would be expected, students are perceived to benefit most from the services/ facilities provided by universities (77 per cent). The second group perceived to benefit most interestingly is employers (37 per cent) and being one of the key interest groups, it is important to recognise that the interaction and level of benefits is very high between employers and universities.



**Figure 6: Top three groups who benefit and do not benefit from services/ facilities provided by universities**



Base: All Londoners (n=1571)

It is evident the work done in partnership with businesses by universities is clearly well known, whether through a graduate scheme or summer internships. Universities 'preparing' students for their future careers is clearly a benefit to both employers and business professionals and one which is widely recognised among those resident in London.

At the other end of the spectrum it seems those who benefit least is the elderly with 42 per cent of Londoners stating that this group does not benefit from services/ facilities provided by universities. Previously it was identified that educating the young and old was something universities were strongly associated with, however these scores indicate that perhaps lifelong learning is not the only service universities can provide. A gap seems to exist between perception and reality and perhaps an indication that more is required by the elderly, from universities. This could be more in the form of a social benefit than educational. An additional factor to take into account is that 62 per cent of Londoners stated that they



don't know about lifelong learning. Increase communication and awareness could be the first step in engaging the elderly further.

Young children and families are also among the top three groups who benefit least from services/ facilities provided by universities with 36 per cent and 26 per cent stating this respectively.

Being one of the key interest groups, the level of engagement and interaction among universities and children and young people is very low. In further chapters we identify levels of awareness of children's services/ facilities and its potential impact on usage.

A clear pattern exists in that those who fall under the educational and business sector are perceived to benefit more from universities than the local community (e.g. parents and children).



### 3 What does a university mean to the public

Now that we have understood how universities are perceived by respondents, we explore perception further by understanding what universities actually mean to the public and how open and approachable the public think they are.

#### 3.1 Universities and the local area

Londoners see their local universities positively overall, with 29 per cent feeling that local universities are perceived positively and only 6 per cent that they are perceived negatively. However the majority of respondents either have a neutral opinion or no opinion, suggesting that many people have limited knowledge of their local universities. The groups most likely to think that local universities are perceived positively are students, younger age groups and higher socio-economic groups.

The majority of Londoners believe that the reputation of local universities either does not affect perceptions of the local area as a whole, or has a positive impact on them. Opinion was split as to whether there was such an impact, with a third (35 per cent) agreeing and the same amount disagreeing, however among those who did believe there was an impact, this impact was predominantly seen to be a positive one (69 per cent compared with 13 per cent who saw a negative impact).

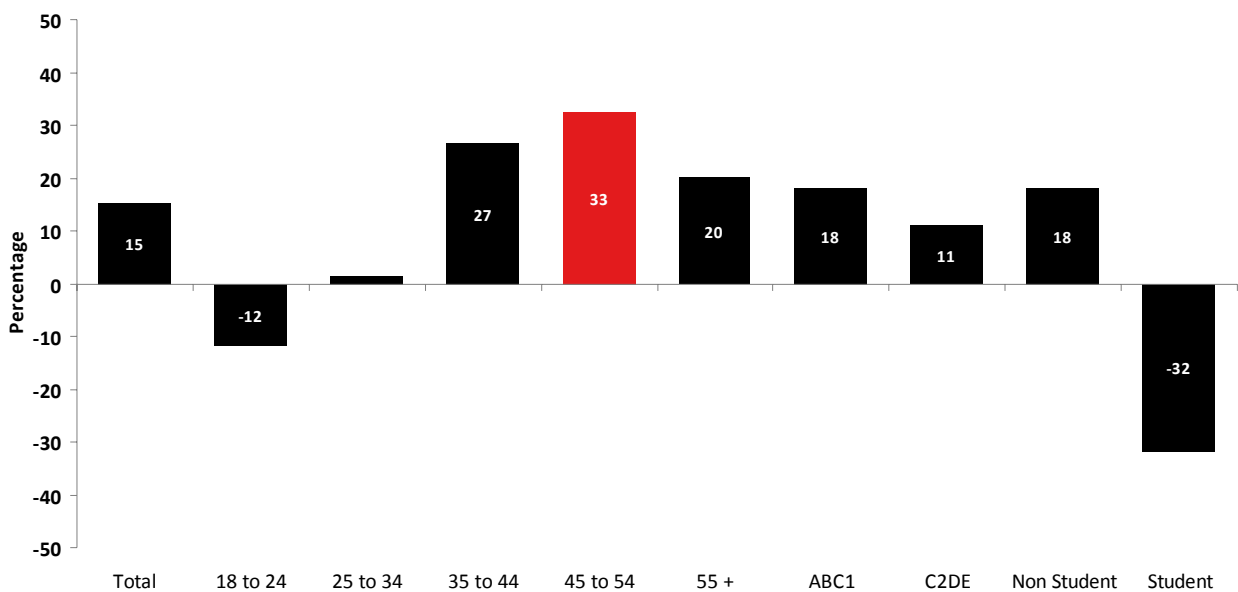
Similarly, when asked about the contribution of universities to the local community, most respondents see the contribution either as neutral or positive, with only 3 per cent having a negative opinion. Younger age groups are most likely to see the contribution as positive, but older respondents are not significantly more likely to see it as negative; rather they are more likely to not express an opinion at all.



### 3.2 Openness and approachability

In general, universities are not seen as particularly open or approachable by members of the public. 37 per cent agree that universities are not generally approachable, while only 21 per cent disagree, giving a net agreement score of 15. This view is held most strongly among middle age groups and non-student groups, while younger age groups and students are likely to see universities as approachable. Interestingly, higher socio-economic groups are less likely to see universities as approachable than are lower socio-economic groups.

**Figure 7: Universities are generally NOT approachable: net agreement score**

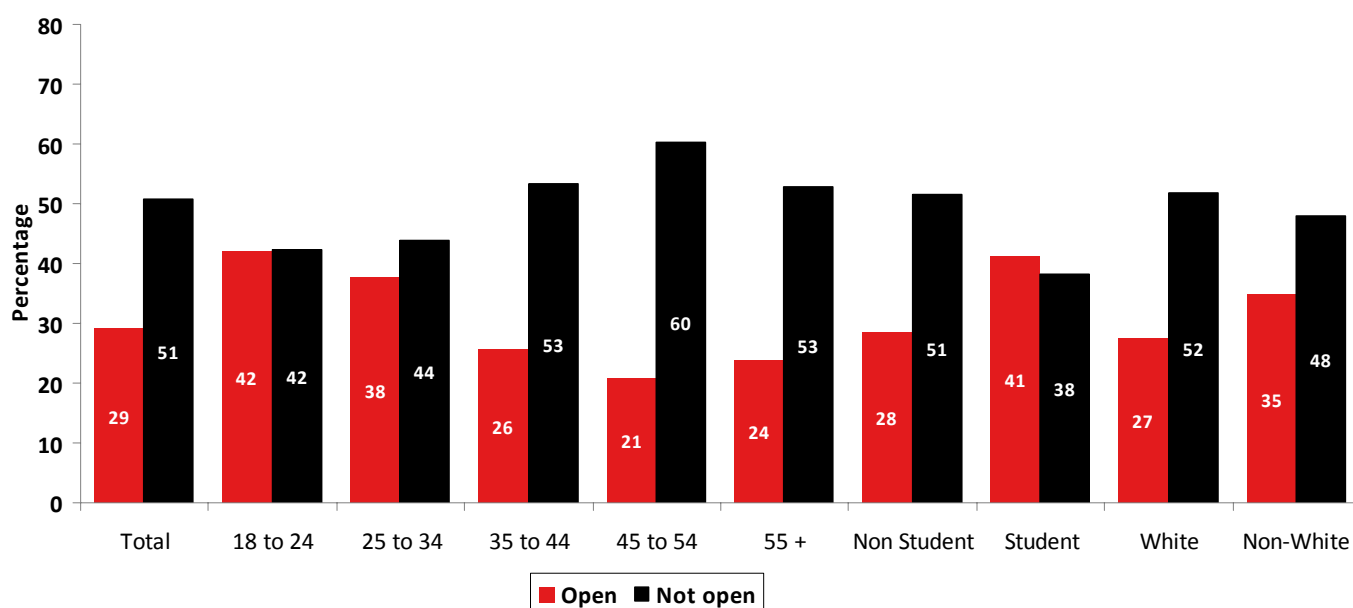


Base: All Londoners (n=1576)



When respondents were asked how open universities are, a similar pattern was shown. Half (51 per cent) of Londoners think that universities generally are not very or not at all open, while only 29 per cent think they are very or fairly open. Younger age groups are most likely to see universities as open, but even among 18 to 24s, respondents are equally likely to see universities as not open as they are to see them as open. The view of universities as open decreases with the age of the respondent. Students are naturally more likely to see universities as open than the rest of the population, but even among students a sizable proportion think that they are not open. While the question on how approachable universities are did not show a large variation according to ethnicity, for this question non-white groups were significantly more likely to view universities as open than were white respondents.

**Figure 8: Openness of universities**



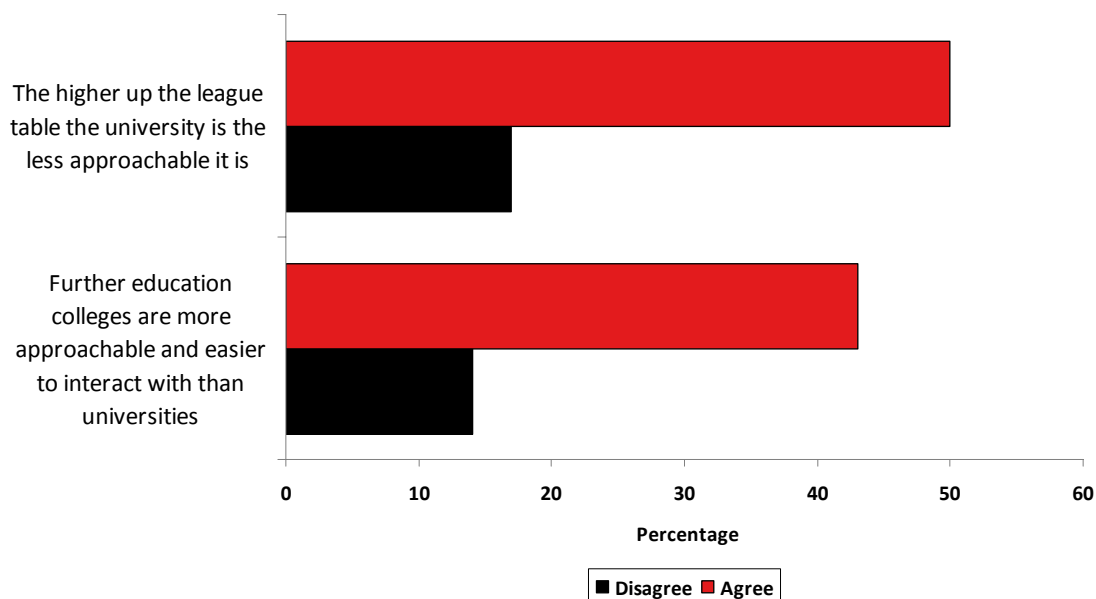
Base: All Londoners (n=1576)



When respondents were asked about the openness of universities in their local area in particular, the proportions of those seeing them as open or not open were largely similar to those for universities in general, however a larger proportion did not express an opinion at all. It is likely that many people do not have any direct experience of their local university and only have a general view of universities to go on.

When compared with further education colleges, there was a general view that these were more approachable/ easier to interact with than universities. 43 per cent agreed with this position, compared with 14 per cent who disagreed, giving a net agreement score of 29 per cent. Respondents were also strongly of the opinion that high status universities are less approachable than lower status ones.

**Figure 9: Relative approachability of different types of institution**



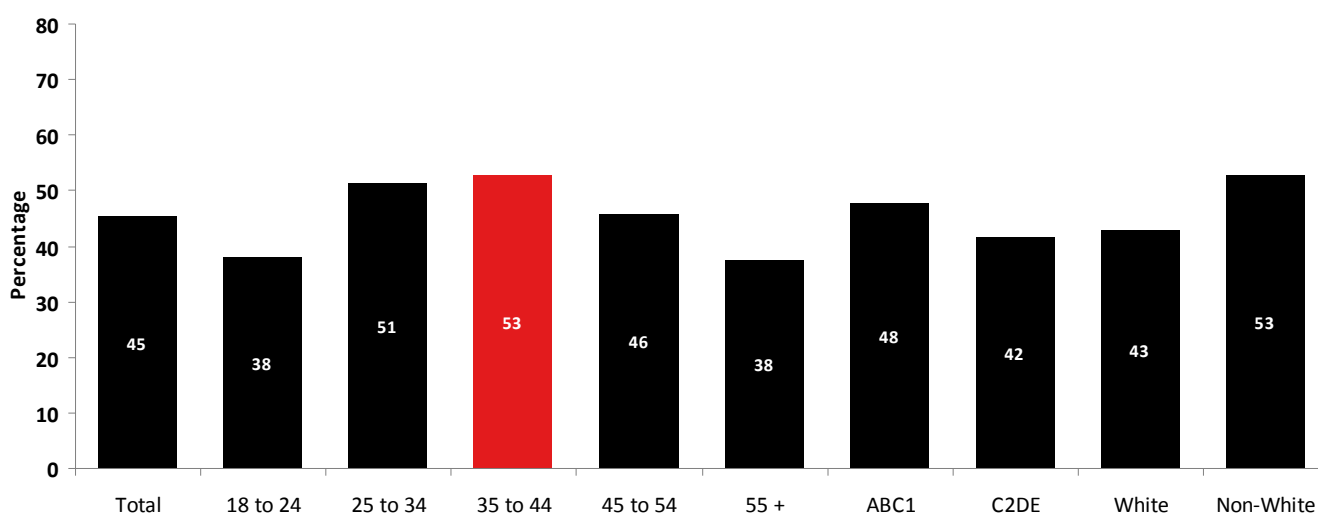
Base: All Londoners (n=1576)



When asked to compare universities in London with those outside, however, opinion was split with an equal amount agreeing and disagreeing that London universities are harder to interact with than those outside London. There was also no overall expectation that facilities at London universities would be better than those at other universities, with only 21 per cent agreeing that they would be, compared with 35 per cent disagreeing.

Almost half (45 per cent) of respondents thought that if universities became more open, they would be more likely to use their services/ facilities. This was most pronounced among 35 to 44 year olds with 53 per cent saying they would be more likely. There was also a variation by ethnicity, with 53 per cent of non-white groups saying that this would make them more likely, compared to 43 per cent of white respondents.

**Figure 10: Those who would be more likely to use university services/ facilities if they were more open**



Base: All Londoners (n=1576)



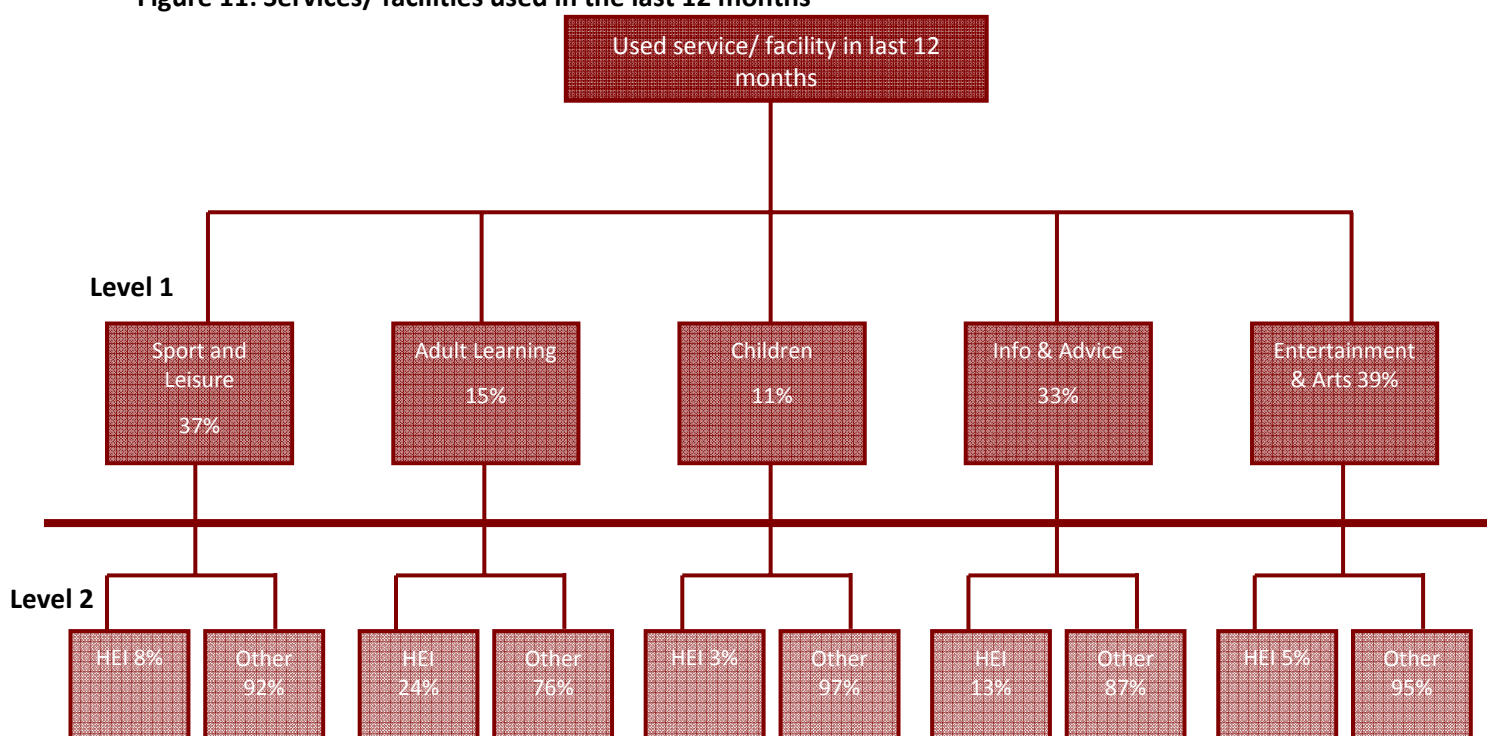
## 4 University Services and Facilities

In this chapter we will explore each of the five banks in terms of who uses them and why they use them. We will then identify who the service provider is for each of these banks and what percentage actually use universities.

### 4.1 The need for a service

In order to derive a social benefit it is first important to identify whether the 'benefit' exists. In an attempt to capture 'benefits' it was firstly important to identify needs. We approached this by identifying 5 banks which widely cover the types of services/ facilities that could be required by Londoners. As mentioned earlier these banks were based on Phase 1 of the SILH project and services/ facilities within each bank are not representative of the full range of services/ facilities provided by London universities. Level 1 in the figure below shows the overall usage of the 5 banks by Londoners in the last 12 months.

**Figure 11: Services/ facilities used in the last 12 months**



The bank used the most is Entertainment and Arts (39 per cent) followed by sports and leisure (37 per cent) and information services and advice (33 per cent). Figures indicate that overall usage of the five banks is relatively low among Londoners as a whole.

Once usage of banks had been identified, respondents were asked to indicate their service provider for the particular service/ facility they had used most recently. Level 2 of figure 11 shows the percentage that used a university as a service provider and the percentage that used some other service provider (e.g. a private company, public organisation, voluntary organisation etc). Results indicate that for all banks the majority fell to using another service provider as opposed to a university. The table below shows a more detailed breakdown of service providers used within each bank.

**Table 4: Current users service providers**

Provider	Sports & Leisure	Adult Learning	Children	Information resources & Advice	Entertainment & Arts
	%	%	%	%	%
A private company	30	14	22	3	63
A public organisation (e.g. local authority)	49	38	52	72	18
A voluntary organisation (e.g. community group)	3	10	11	5	4
A university	8	24	3	13	5
Other	3	8	5	2	3
Don't know	5	6	7	6	8
<b>Base</b>	<b>589</b>	<b>230</b>	<b>172</b>	<b>522</b>	<b>611</b>



For sports and leisure services/ facilities, information resources and advice and children's services/ facilities, public organisations were the most popular service providers.

The main providers for entertainment and arts services/ facilities were private companies (63 per cent). Voluntary organisations seemed to be the least popular among banks with low scores being achieved within each.

The most common bank for which universities were used as service providers was Adult Learning (24 per cent). Interestingly, in chapter 9 the adult learning bank has also been identified as having the highest proportion of respondents with a future need. In order to look deeper into the usage or lack of usage of universities, it is important to explore reasons and justification among the two different groups – university users and non users.



## 4.2 Who uses the banks?

Before breaking down usage any further it is first important to identify who these Londoners are. The table below shows a breakdown of the users across certain demographics to identify which types of people use these services/ facilities most.

**Table 5: Demographic breakdown of bank users**

Bank	Young (18 to 24)	Old (60+)	ABC1	C2DE	White	NonWhite
	%	%	%	%	%	%
Sports & Leisure	52	22	40	33	37	38
Adult Learning	23	11	13	17	14	18
Children	9	3	11	11	10	13
Information resources & Advice	49	24	33	33	31	39
Entertainment & Arts	57	27	41	36	39	39
<b>Base</b>	<b>185</b>	<b>279</b>	<b>953</b>	<b>623</b>	<b>1167</b>	<b>409</b>

*Although base sizes differ, indicative comparisons are able to be made due to robust base sizes among each group.*

Young people use sports and leisure facilities most (52 per cent) followed by those in Social Group ABC1 (40 per cent) and the non-white population (38 per cent). This is perhaps an indication that if universities wish to increase either their perception among or interaction with ethnic minorities, then provision of sports and leisure facilities is a good area to start.

Adult learning was also used mostly by young people (23 per cent) however; usage among other groups was relatively low. Nonetheless, ethnic minorities were second group most likely to use Adult learning (18 per cent) followed closely by those in Social Group C2DE (17 per cent).



Scores for usage of children's services/ facilities were generally low overall with the non-white population using these facilities in the last 12 months the most. Entertainment and arts was again mostly used by young people with over half stating this (57 per cent), nonetheless this was also a bank popular among social group ABC1 (41 per cent). It can be assumed that belonging to a higher social group results in perhaps more disposable income which is used on things such as entertainment and arts and could be an explanation as to why their scores are high.

At an overall glance it seems that young people are the most 'active' among the five banks with having the highest usage for most. Now that we have examined who these users are, and what percentage use universities, the second stage is to understand 'why' and this will be explored in the next section.



## 5 Awareness and Usage of universities

In this chapter we will explore awareness of services/ facilities provided by universities and reasons for usage. We analyse this across each bank and provide indicative explanations for each.

### 5.1 Why did respondents use a university facility?

Due to small percentages of respondents using universities as a service provider it is difficult to definitively explain why they used a university. Nonetheless, the figure below shows an indication of firstly where they heard about the service/ facility provided by the university and secondly reasons for using it (please note services/ facilities for children have not been included due to only 5 people falling into this category).

Figure 12: Awareness and Usage of university services/ facilities

Awareness			
Sport & Leisure	Adult Learning	Information	Entertainment
1. Word of mouth	Through my own personal research	Through my own personal research	Word of mouth
2. Through my own personal research	Word of mouth	Word of mouth	Recommendation by friends/ family
3. Recommendation by friends/ family	Recommendation by friends/ family	Through someone I know	Through my own personal research
1. Value for money	The university has a good reputation in general	The university provides a good service/ facility	The university provides a good service/ facility
2. In my local area so easy access	In my local area so easy access	In my local area so easy access	Recommendation by friends/ family who use it
3. Recommendation by friends/ family who use it	The university provides a good service/ facility	The university has a good reputation in general	The university has a good reputation in general
Sport & Leisure	Adult Learning	Information	Entertainment
Usage			



Results indicate that the majority of respondents heard about the university's service/ facility through word of mouth or through their own personal research. Recommendation by friends or family members also plays an important part in awareness, in particular for those who use entertainment and arts services/ facilities within universities. In regards to information resources and advice, people heard about this through someone they knew as well as word of mouth and their own personal research.

Reasons for usage varied among the different banks. Results suggest that for sports and leisure, most Londoners use the facilities of universities because they offer value for money whereas for adult learning, universities were mainly used due to their good reputation in general.

With information resources and advice and entertainment and arts, the decision to use a university was dependent on them providing a good service/ facility. For entertainment and arts in particular it seems recommendations by friends/ family who have previously used the university's service was an important reason for its usage, as well as the reputation that the university holds. A factor which was not as important in determining usage of universities for entertainment and arts services/ facilities was accessibility. For sports and leisure, adult learning and information resources, having easy access to the university due to it being situated in the respondent's local area was the second most important reason for using it.

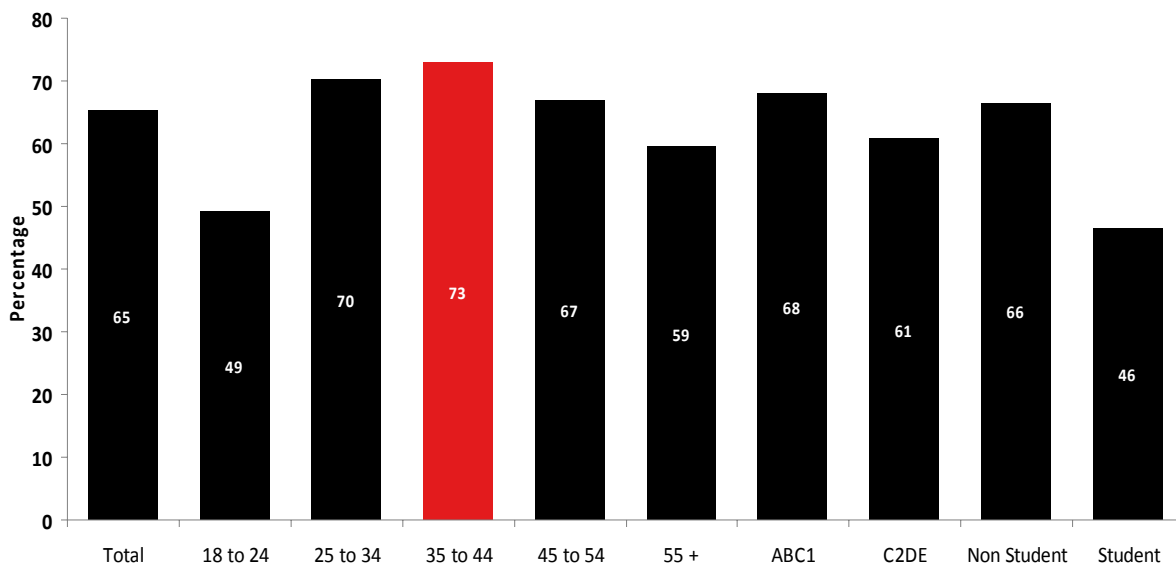
To increase usage of universities as providers of services/ facilities it seems more needs to be done in terms of communication. Word of mouth, personal research and recommendation have risen as the most popular sources from where respondents heard about the universities services. A wider promotion of what universities have to offer could have the potential to increase not only future usage but improve the perception that universities are not purely about students and education. Ease of access and reputation are important factors in increasing usage and could be attributes that universities in London can use to their advantage.

Increased communication could have a direct impact on take-up of university services by the public. Two thirds (65 per cent) of Londoners say that they would be more likely to use local university services/facilities if the universities did more to make them aware of those services/facilities. This is even



more pronounced among middle age groups – who are also most likely to express a need for better communication – with 73 per cent of 35 to 44 year olds saying they would be more likely. While increased awareness would naturally make more difference for non-students, even among students 46 per cent say they would be more likely to use university services/facilities if awareness was increased, showing that even among those already using some services/facilities, there can be information gaps regarding other aspects of what universities provide.

**Figure 13: Those who would be more likely to use university services/ facilities with increased awareness**



Base: Londoners with a local university (n=1151)

In chapter 8 we examine usage further by identifying key demographic drivers of university service and facility use.



## 6 Universities as service providers

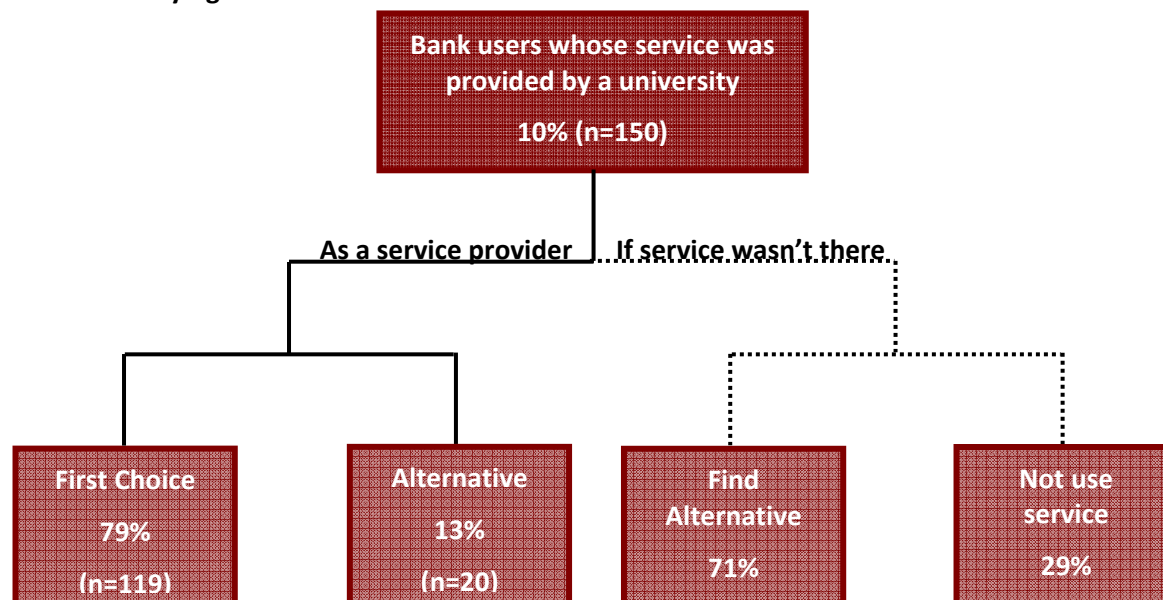
In this chapter we will begin to identify whether the social benefit provided by a university would have happened anyway because the respondent would have used a similar provider. The chapter will explore what percentage of Londoners used a university as their first choice and whether or not Londoners would continue to use the service/ facility if the university did not provide it. In addition, it will identify why those who had a need did not use universities and their general awareness about the types of services/ facilities universities provide. The substitution effect of universities as service providers will be discussed in more depth in chapter 9.

### 6.1 First choice or an alternative?

To identify the social benefit provided by universities, it is important to understand the purpose they serve – are they a first choice or an alternative? As a result, we have asked respondents in the questionnaire to identify whether or not the university was their first choice for each bank. In total 150 Londoners used a university as a service provider for one or more of the banks. Due to small bases sizes for individual banks we have analysed the data collectively.



**Figure 14: Identifying universities as a need or substitution of a need**



*As a result of small bases sizes, only indicative comparisons are able to be made.*

The results indicate that of those who used universities for each bank, for the majority (79 per cent) it was their first choice rather than an alternative. There is a clear indication here that despite low usage, universities in London are providing a social benefit that might not be obtained by the respondent if it did not provide it. If levels of awareness and range of services/ facilities were increased, figures here indicate that universities have the potential to be widely used.

Respondents were then asked whether or not they would use an alternative provider if the service/ facility were not provided and the majority stated they would with a small amount stating that they would not use the service.

For almost three quarters of current users, the university was their first choice as a service provider. Despite the majority of current users finding an alternative provider if the university did not provide the service/ facility, a significant number would not use the service/ facility. Figures indicate that the level of substitution is low but the level of replacement is still relatively high.



As identified earlier there are three types of users:

**User** – respondents who used a bank service/ facility in the last 12 months and used a university

**Alternative service users** – respondents who used a bank service/ facility in the last 12 months but had not used a university but another service provider

**Future users** – respondents who had not used a banks service/ facility in the last 12 months but may in the future

The next sections of this chapter will explore users and what factors influence their usage behavior followed by a section exploring alternative service users.



## 6.2 Users - What effects usage?

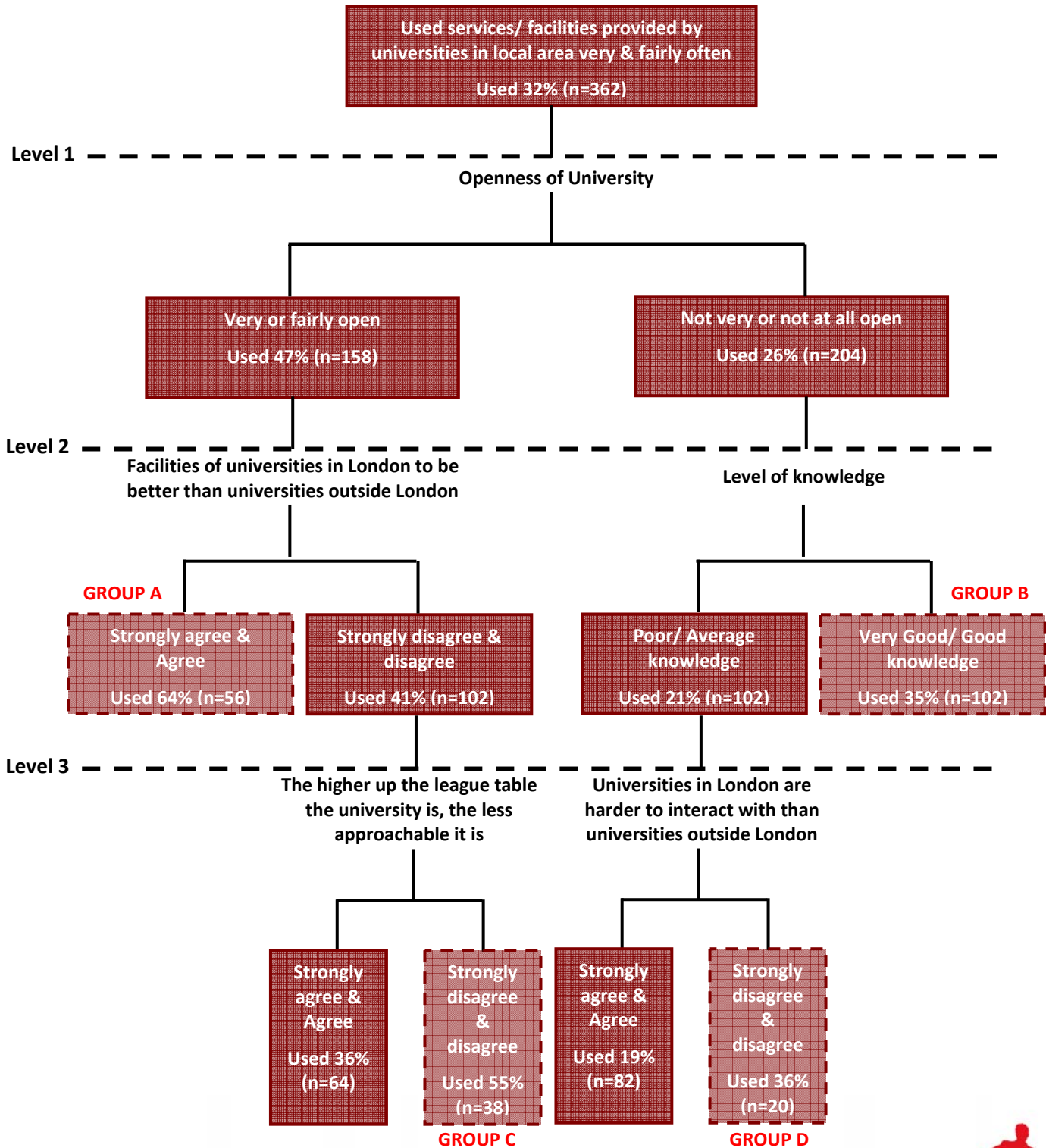
Application of the CHAID Model (Chi-squared Automatic Interaction Detector) identified that the openness of the universities is the main factor in influencing usage of services/ facilities provided by universities.

CHAID is a heuristic decision tree method for classifying data or detecting the interaction between variables. CHAID excludes the variables that have lower correlation with dependant variable and higher probability of errors. Effects of openness and elitism among universities are discussed further in chapter 8.

The CHAID Model overleaf explores what factors influence Users behaviour and what would make them use university services/ facilities more or less.



Figure 15: Factors behind use of service and facilities



Londoners, who hold the view that universities in general are either very or fairly open, use the services/ facilities provided by universities in their local area more often. As shown above, 47 per cent of this group uses services/ facilities provided by universities in their local area compared to 26 per cent who don't think universities in general are open. From this the assumption can be made that positive perceptions of openness influence likelihood to use.

As we move down to level 2 we can see that an additional factor that influences frequency of current usage is Londoners opinions on whether or not facilities within London universities are better or worse than universities outside London. We can see that of those who agreed that facilities provided by universities in London are better than facilities provided by universities outside of London have used services and facilities more; 64 per cent compared to 41 per cent who disagree. Perceptions of universities clearly have an influence on the level of usage – the better the perception, the higher the usage.

We finally come to a third level of current users who agree that universities in general are open but disagree that facilities provided by universities in London are better than facilities provided by universities outside of London. Their usage is affected by an additional factor which is how approachable universities are. Those who agree that the higher up the league table the university is, the less approachable it is, use services/ facilities provided by universities in their local area less than those who disagree. Comparison of figures shows that 36 per cent who agree used services/ facilities compared to 55 per cent who disagree. This is an indication that approachability is certainly a factor that affects current usage and that despite ranking if universities are approachable they will be used more.

Moving to those current users who don't think universities are open in general, there are different factors that affect their usage. At level 2 the first factor affecting usage is level of knowledge. Those who are more knowledgeable about universities tend to use them more than those who are not (35 per cent compared to 21 per cent); therefore increasing knowledge among Londoners has the potential to increase usage of universities.



At level 3 the factor effecting current usage is interaction. Londoners who perceive universities in London harder to interact with tend to use services provided by them less. Those who agree that London universities are harder to interact with use services less (19 per cent compared to 36 per cent).

Now that we have identified factors of usage among university users, the next section of this chapter will look at alternative service users.



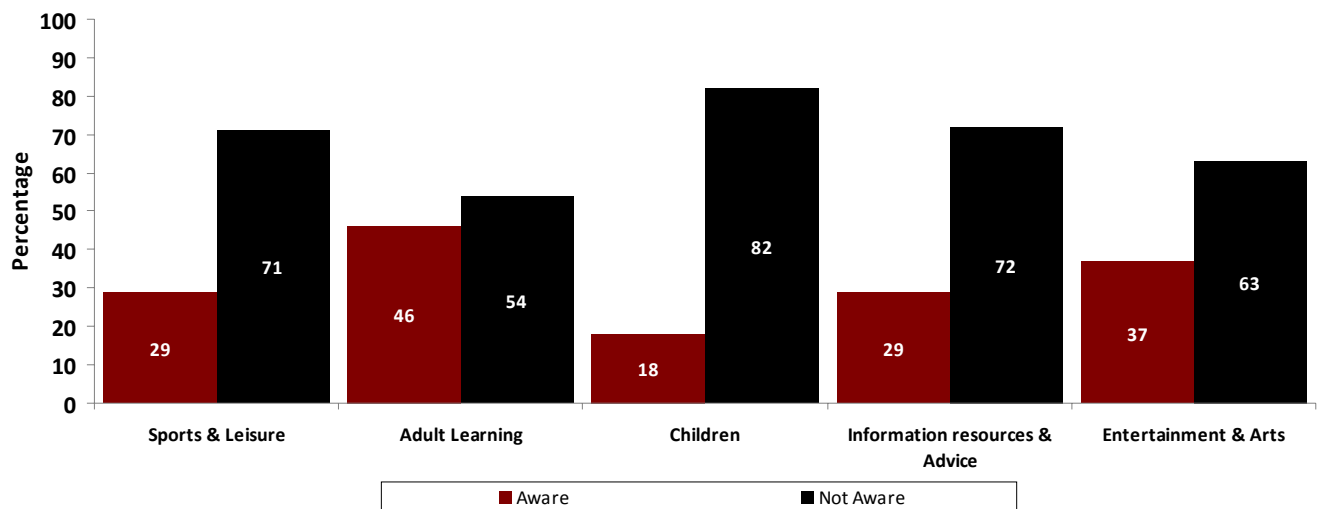
## 7 Service users who went to an alternative provider

In this chapter we will explore what we call alternative users, these are individuals who have needed to use a bank's service/ facility but have not used a university as the provider. The chapter will identify the level of awareness and lack of usage of universities services/ facilities.

### 7.1 Awareness of services/ facilities

Alternative users were first asked whether or not they were aware that the services/ facilities stated within each bank were available to the public. As the figure below shows the majority were not aware.

**Figure 16: Alternative users' awareness of universities as providers**



Base: Sports and Leisure (n=539) Adult Learning (n=174) Children (167) Information & Advice (n=453) Entertainment & Arts (n=580)

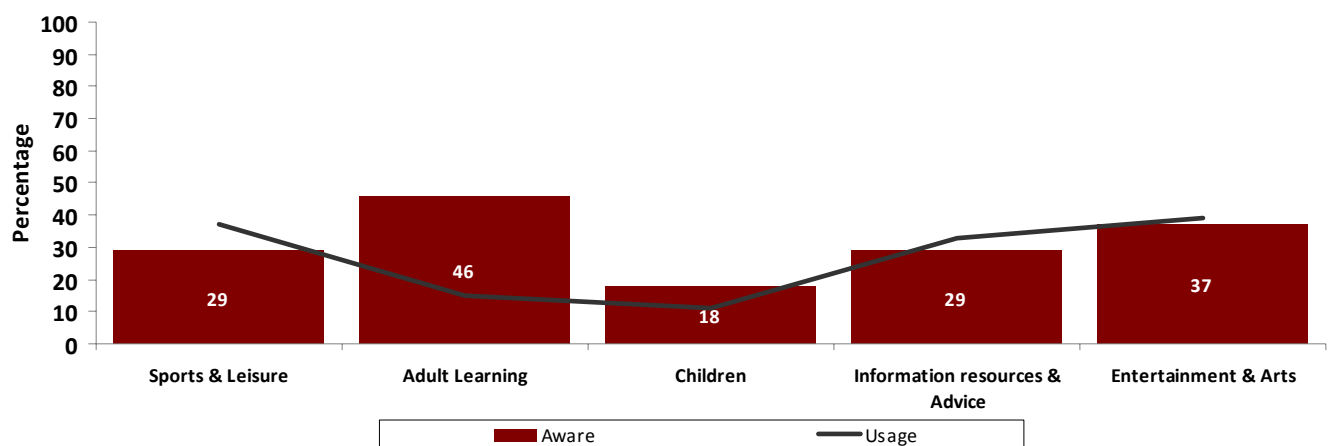


It is clear that a significant majority are unaware of the actual and potential services that universities offer. Interestingly the children's bank had the lowest level of usage and here we can see that it has the lowest level of awareness with 82 per cent stating that they were not aware the services/ facilities for children were available to them. Lack of usage is clearly linked to lack of awareness and potentially an area that needs to be looked into.

The bank where level of awareness are fairly balanced is Adult learning with 46 per cent aware and 54 per cent not aware.

The figure below is the level of awareness of a university provided service plotted against the overall level of service use regardless of provider. As the chart shows a correlation exists between the two variables.

**Figure 17: Correlation between awareness of bank facility and overall usage**



Those banks which have a low level of overall usage (regardless of provider) also have low levels of awareness that a university offers the service or facility. For entertainment and arts it is evident that the level of usage and awareness are in sync with each other. Though adult learning has a high awareness level its usage is still relatively low. This links back to our findings earlier that there may be more universities can do in terms of learning.



Despite having a high usage rate many Londoners were not aware that university sports and leisure facilities were available to the general public. Nonetheless lack of awareness has not had a significant effect on usage - despite being unaware usage is still high. Previously it was identified that the main reasons for using a universities sports and leisure services/ facilities was value for money. This may be an indication that Londoners have a perception that using facilities of a university will be cheaper than using a private sports service/ facility provider. Therefore, despite lack of knowledge, Londoners still use the facilities because of their connotation with value for money.



## 8 Propensity to derive a social benefit

In this chapter we analyse usage in further detail. Key driver analysis is used to determine likelihood to derive a social benefit through the use of a university provided activity. This builds on chapter 5 and uses regression analysis to identify those factors that explain how likely a respondent is to use a university provided service or facility. Many iterations of the model are run until its explanatory power is maximised. Only factors that have a statistically significant explanatory power are used.

There are two models used in this analysis. These are a demographic model and an attitudinal one. The demographic model examines how key characteristics such as age and gender affect the usage of university provided services. The attitudinal model relates more to how people feel about universities and their role in society.

The analysis is undertaken for a combined total of university service users across all banks. As explained earlier there are not enough users in each individual bank to undertake the analysis separately. The analysis does not, therefore, show inter-bank variations. It does, however, give significant insight into why some people use university services and others do not.

Each chart only displays the factors from the above lists that are significant in explaining stakeholder's likelihood to recommend. The number against each factor shows its relative importance.

### 8.1 Demographic model

To establish the relationship between demographic characteristics and use of university facilities/ services, a number of factors were entered into the model. These were:

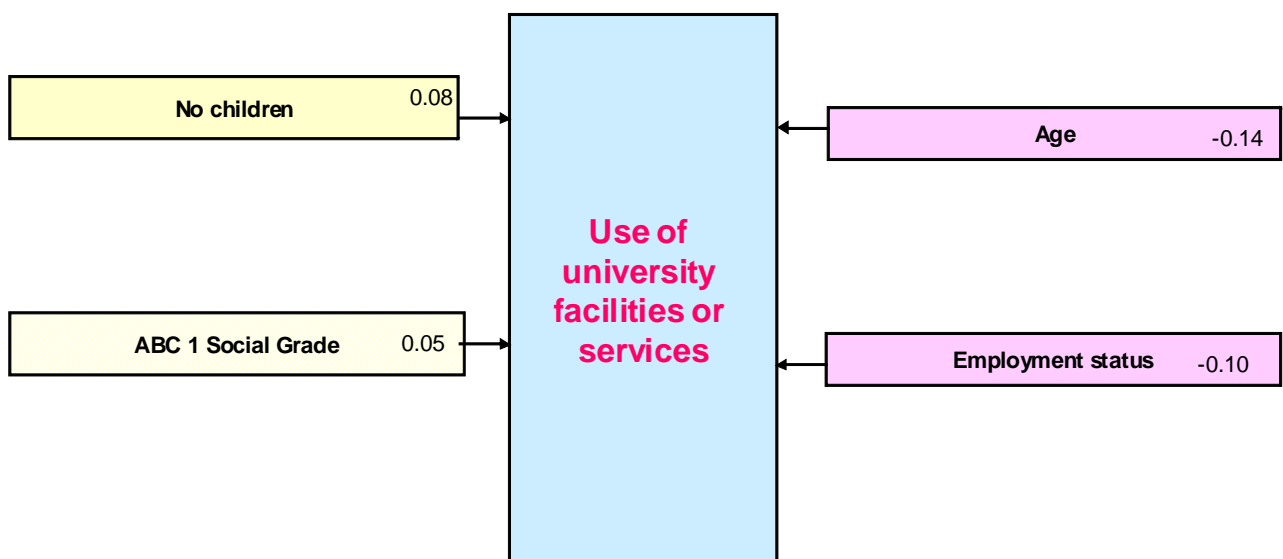
- Age of respondent
- Whether they have children
- Ethnicity
- The gender of the respondent



- Employment status
- Social grade
- Highest level of educational attainment

Of these factors, four were identified as being statistically significant at the 95 per cent confidence level in describing usage. These are shown in the following chart.

**Figure 18 : Key demographic drivers of university service and facility use**



The model shows that age, employment status, social grade and whether or not the respondent has children are key drivers of use. What is interesting is the direction of the relationship. The strongest relationship is between age and usage at -.14. The negative relationship means that the older the person is the less likely they are to use services. The relationship is the same for employment status. Here the data shows that the more someone moves away from being employed full time (such as being unemployed or retired) the less likely they are to use a HEI.

Respondents with children are statistically less likely to use HEI provided services than those without. In similar fashion the higher the social grade the more likely a person is to use a university provided service.

There is no statistically significant relationship between gender, ethnic origin and highest level of qualification and use of university services.

The model shows that university services are not accessed by significant elements of the population but it has to be remembered that the model displays likelihood to use within the context overall of very limited usage.

## 8.2 Attitudinal model

The attitudinal model works in the same way as the demographic model but this time looks at respondents attitudes to the place that a university has in society, who is it for and what it should be doing.

To assemble the model respondents' responses to a number of attitudinal questions were analysed. These questions were:

- The most popular ways in which respondents believe that universities benefit society. Choices were: educating people, providing jobs, preparing young people for the working world, providing lifelong learning, providing knowledge, providing information, health and well being, enabling different communities to interact, providing entrepreneurship, providing equality of opportunity.
- The degree to which respondents have knowledge and are aware of universities

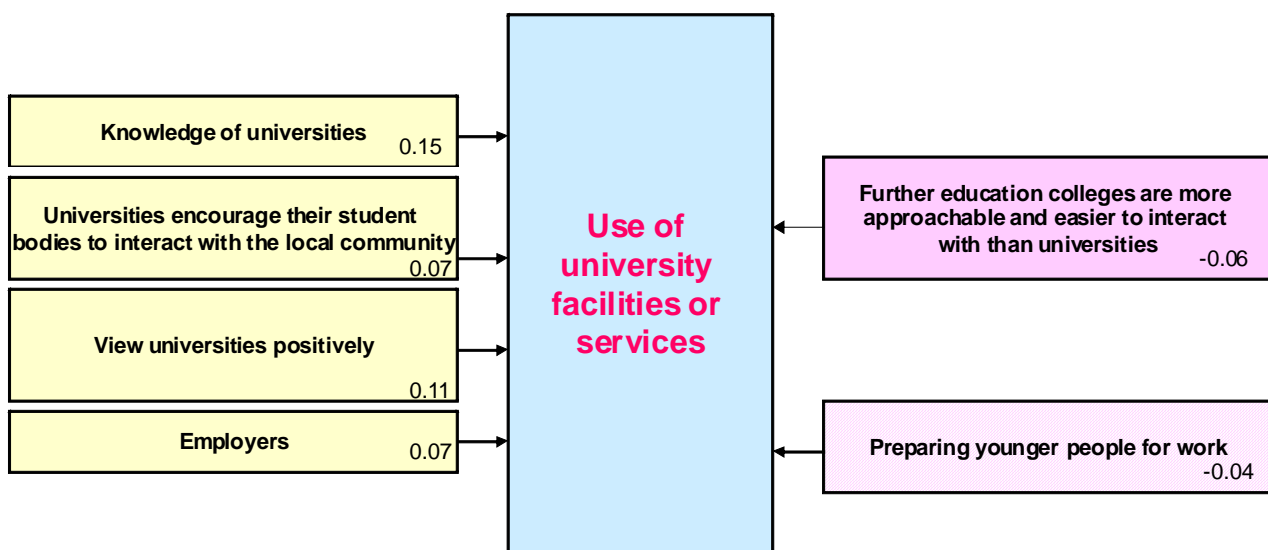


- Perception of universities as either positive or negative institutions within the local community
- Whether respondents believe that they are open or elitist
- How they compare to FE colleges
- Views on who gains the most from universities. Choices were: students, families, parents, socially disadvantaged groups, businesses, the elderly, children, local communities
- The extent to which respondents agree or disagree with the statement that universities encourage their student bodies to interact with the local community.

The chart overleaf shows the key attitudinal drivers and their relative strength.



Figure 19 : Key attitudinal drivers of university service and facility use



Not surprisingly those respondents who have a good existing knowledge of universities are more likely to use their services and facilities – this was also identified in the Chaid Model in chapter 6. Similarly those who view universities positively and believe that universities encourage their students to interact with the local community are more likely to use them. Alumni networks could also be seen as important catalyst to keep the community involved. As identified earlier, word-of-mouth is a common communication method to inform the community of what universities have to offer. Engaging with graduates via alumni network will further strengthen the communication trail about the services/ facilities provided by universities.



On the negative side, however, those who think that further education colleges are more approachable are less likely to use universities as are those who do not agree with the statement that universities prepare students for work.

### 8.3 What does the key driver analysis mean?

What is clear from the key driver analysis is that the social impact of universities has a tendency to be limited to those who already have a good understanding of the role a university can play in society and as a result have a positive view of them. Much of this is related to the background of users. We saw earlier that users are more likely to belong to the ABC1 social class, in full time employment and are more likely to be young than old. Having children works negatively in that families are statistically less likely to use university services and facilities.

The key issue coming out of the key driver analysis is what, if anything, can universities do to make themselves more accessible to the local community? When asked what local universities should do more of, the most popular response was 'Increase awareness about their services/ facilities' (37 per cent), followed by 'Provide better information on their activities to the community' (34 per cent). A quarter of respondents also think that universities should 'Improve access to their facilities for the local community', showing a desire for increased openness as well as communication. To a large extent, addressing this issue is not too difficult. As figures above indicate, much of the answer relates to providing the local community with more information about what it does but also making access easier.

We saw earlier that only 22 per cent of respondents believed their local university to be open to them. This figure falls sharply for older people, families and the unemployed. With older people in particular, a generational issue exists so to speak. As many of the older people come from an era where perhaps only the 'top 5 per cent' attended university, their perceptions of universities overall will tend to be significantly different. Being an institution that was not attended by the mass could filter into why figures for openness fall sharply for older people.

Promoting the wider benefits of universities among these key demographic groups would improve the social impact.



## 9 Future needs

In this chapter we look at future needs and the role universities could play in meeting needs. For each of the banks we look at who is likely to have a need to use one of its facilities. We analyse the type of provider they believe will meet their needs and whether they would consider using a university instead. Finally, a comparison is made between the characteristics of potential future users and the characteristics of current users to see whether there is an opportunity to broaden the distribution of social benefits.

### 9.1 Assessing future needs

The way that we have assessed future needs is by asking respondents who did not use any services or facilities in the last 12 months regardless of provider, whether they would need to use them in the future. Again this was irrespective of provider.

The table overleaf shows the proportion of respondents who are likely to have a future need and from whom they expect their need to be met.



Table 6 : Future needs by bank

Bank	Sports & Leisure	Adult Learning	Children	Information resources & Advice	Entertainment & Arts
	%	%	%	%	%
Likely to have a future need (% of total population)	12	17	9	8	9
Need likely to be met by private sector (% of those with a need)	18	8	8	6	28
Need likely to be met by public sector (% of those with a need)	57	62	58	60	40
Need likely to be met by voluntary sector (% of those with a need)	5	7	6	13	10
Need likely to be met by other/unknown (% of those with a need)	20	23	28	20	21
Would use HEI (% of those with a need)	<b>57</b>	<b>75</b>	<b>53</b>	<b>66</b>	<b>65</b>
Base	<b>184</b>	<b>260</b>	<b>136</b>	<b>132</b>	<b>148</b>



The response indicates a low perception of future needs. The adult learning bank has the highest proportion of respondents with a future need but only 17 per cent of the population considered this a possibility. This is followed by Sports and Leisure. The table reveals a limited latent demand for services with an expectation among a significant proportion of respondents that the public sector will be the provider. Clearly much depends here upon the availability of publicly sector services. With the exception of Arts and Entertainment, very few respondents expect the private sector to provide the services they need.

Important questions here are (i) to what extent Universities could increase public understanding of opportunities and benefits and (ii) to what extent can universities provide alternative choices to existing providers? The table shows that the majority of future users would use a university if they knew one existed in the area. At first glance this shows that universities could make a significant impact in meeting demand for a service among people who do not currently use it. However, further analysis of the data suggests that there is a strong substitution effect. The table shows the percentage of respondents with a latent future demand who would use university services if available. By analysing this answer against the type of organisation that they expect to provide them with the service the origin of the switch (for example from private sector to HEI) can be seen. The data shows that the majority of the 'switchers' would switch from a public sector provider. This begs a further question about whether HEI provision should compete with public sector provision or be complementary to it.

An important consideration is whether future users are different in characteristics than current users. The table overleaf summarises the key differences.



**Table 7 : Characteristics of users compared with potential users**

Characteristic	Users	Potential users
	%	%
C2DE	39	38
Have children	52	58
Aged 60 or more	13	13
Non-white	27	35
Not working	4	4
No formal qualifications	4	4

The table shows the characteristics of current users of services irrespective of provider. All services have been combined for ease of presentation. There are two statistically significant variations between users and potential users. The table shows that 52 per cent of current users (across all banks) have children whereas 58 per cent of potential users have children. Similarly, whereas 27 per cent of current users are non-white ethnic origins, the figure for potential users is 35 per cent.

This analysis shows that there is potential to extend the social benefits of universities to a much wider and diverse audience by tapping into the needs of latent users. The issue is whether universities are sufficiently able or motivated to do so.

## 9.2 Potential future users - what does the public want?

Now that we have identified who the future users are the next step is to examine what more universities can do to attract the general public i.e. the 'potential' future users. When asked what local universities should do more of, as the table below shows the most popular response was 'Increase awareness about their services/ facilities' followed by 'Provide better information on their activities to the community'.



Middle age groups were most likely to see a need for better communication, while younger respondents, who are likely to already be more aware of university services and facilities, were less likely to choose this option. Higher socio-economic groups were also somewhat more likely than lower ones to express this need.

**Table 8: What should local universities do more of – top three responses**

	All	18 to 24	25 to 34	35 to 44	45 to 54	55+	ABC1	C2DE
	%	%	%	%	%	%	%	%
Increase awareness about their services/ facilities	37	25	37	43	37	36	39	33
Provide better information on their activities to the community	34	23	36	38	35	33	37	29
Improve access to their facilities for the local community	24	12	29	27	25	23	28	20
<b>Base</b>	<b>1576</b>	<b>185</b>	<b>394</b>	<b>337</b>	<b>217</b>	<b>443</b>	<b>953</b>	<b>623</b>

Figures suggest that lack of communication and awareness are barriers to entry for the general public. As identified earlier on, majority of university users heard about the service/ facility either through word of mouth or someone they know. In order to become more 'attractable' to the general public, a wider and perhaps more detailed approach needs to be taken in terms of how universities portray that they are more than educational institutions.



## 10 Conclusions and Recommendations

There are 42 higher education institutions in London. The research strongly suggests that most Londoners view them primarily as providers of education and centres for undertaking research. Fewer recognise the sports and specialist facilities they provide, such as museums and libraries. Most people are not aware of the wider social and community opportunities they do/could provide. In fact only one per cent of respondents believe that universities benefit the wider community.

Other research by London Higher shows that many London universities are active in the provision of wider services aimed not just at students and businesses but at the community. Services such as children's services, advice services, entertainment and the arts as well as adult lifelong learning are provided to a greater or lesser extent by universities. However, this survey shows that only a minority appear to realise this. In terms of general benefits, Universities are not seen as places that engage different communities and enable them to interact.

By combining data on the users of all the different services a picture can be built of who uses university provided services and why. We estimate from our survey data that about 10 per cent of the London population use services provided by a university in the areas mentioned above. This represents only a small proportion of people who use different services. For example, of all those using sports and leisure facilities in the last 12 months only eight per cent had their need met through a university. For adult learning, where universities might be considered to be a significant provider, the figure was 24 per cent.

It is not just the overall level of university service use that is an issue; it is the characteristics of the people who use the services. Service users who had their needs met by a university tend to be young, childless and working. Low income or unemployed people and families tend not to look to a university to have their wider community needs met.

By undertaking key driver analysis it can be seen that if someone is young, has no children, belongs to an ABC1 social group and is in work she/he is statistically more likely to use a university provider service than older people, families, the unemployed or C2DE social class groups.



The research has also identified a perception gap in relation to lifelong learning. Older people were more likely to identify this as a core university activity but less likely to actually use them for it. Much of this may be due to the extent to which universities are seen as open and accessible. The survey shows that most people do not think they are. They also perceive FE Colleges as more open and approachable. In addition, users of university services become aware that a university provides the service mainly through their own research or through family and friends. There does not seem to be much publicly and locally available information on what universities can do for the local community. It seems that many Londoners have limited knowledge of their local universities, with significant proportions not expressing opinions on the general perceptions, impact or contribution of universities in their local area. Perhaps as a result of this limited knowledge, there is evidence of a demand for increased communication to the local community on the part of universities.

We have identified limited take up and use of university provided facilities but does it actually matter that only a few use them? We think that there is strong evidence to suggest that it does matter. Three quarters of respondents who used a university provided service did so with the university as their first choice. Just as importantly, about 30 per cent of people who used a university said that if the facility did not exist they would not have been able to undertake the activity. This is a really important finding because it shows that universities can meet needs in society that would not otherwise be met.

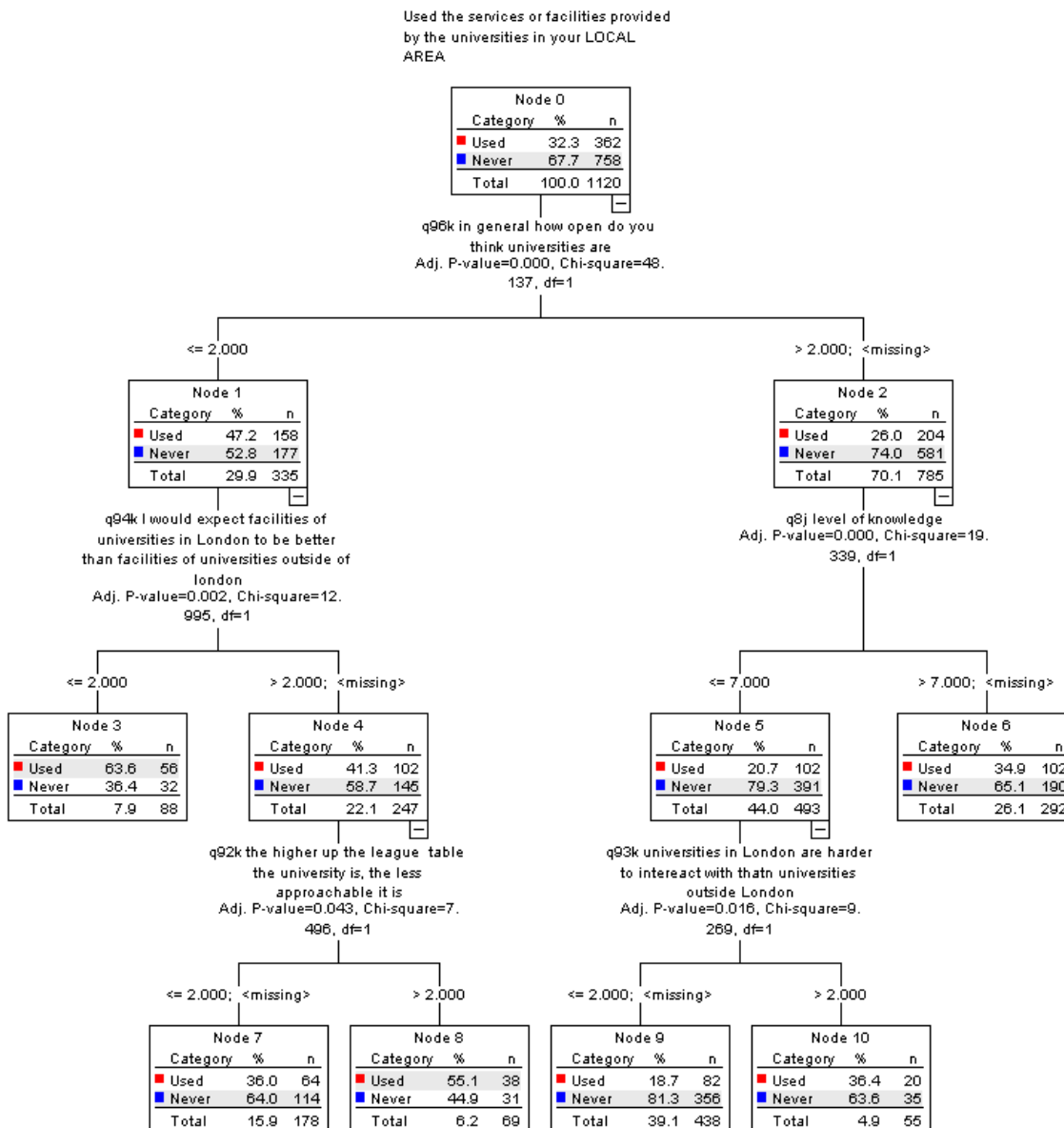
Following on from the research we would suggest the following recommendations:

- Greater publicity should be given, where appropriate, to the services that universities can offer the local community.
- Universities should look at ways to make access easier particularly for groups such as older people, families and low income households who are more likely to be non-users than users.
- Universities are still seen as closed and unapproachable with very limited relevance to their local communities. Greater engagement could take place with the community to build upon the good reputation that universities already have as centres for learning and research and to show how they benefit society more widely.



## 11 Appendix 1: CHAID Model

Below is a detailed version of the Chaid Model as discussed in Chapter 6.



## 12 Appendix 2: Sample Design

YouGov has access to over 10,000 people in London. We are able to draw samples that represent the London adult population as a whole because:

- Our pool is sufficiently large to capture London's diversity
- YouGov's recruitment strategy seeks to maximise the chances of obtaining a broadly-based panel
- The internet itself has now reached all parts of London society

The London political sample is a stratified random sample drawn from those living in the Government Office region of London.

The quotas for the sample are based on:

- Age
- Gender
- Ethnicity
- Past vote and
- Newspaper readership.

Targets are derived from a variety of sources including Census and NRS (National Readership Survey) data.

The table overleaf shows a detailed breakdown of sample in relation to the London targets and figures show that the correction factors applied to bring the data in line with London's population were minimal.



	Unweighted (N)	Unweighted (%)	Target %
<b>Age/ Gender</b>			
Male 18 to 24	91	5.77	5.90
Male 25 to 39	254	16.11	18.20
Male 40 to 54	194	12.30	12.20
Male 55+	218	13.8	11.30
Female 18 to 24	94	5.96	6.00
Female 25 to 39	322	20.43	17.40
Female 40 to 54	178	11.29	12.30
Female 55+	225	14.27	16.70
<b>Social Grade</b>			
ABC1	953	60.46	60
C2DE	623	39.53	40
<b>Ethnicity</b>			
White British	1167	74	74
Non-white British	409	26	26



## 13 Appendix 3: Interpretation of survey findings

### 13.1 Samples

The research is based on a sample of 1576 adults in the London. All data has been weighted to the known profile of the target sample as a whole (explained in appendix 2).

### 13.2 Sub-samples

YouGov provided a breakdown of results for the sample based on single or multiple variables including types, demographics or attitude classifications.

The research used routing so that questions were asked only of appropriate groups. Routing can take place based on a single or multiple variables. Close attention must be paid to the base for each question – these are clearly marked on the tables of results.

### 13.3 Combined and net figures

“Combined” figures refer to the combined percentage of people expressing one view. For example where a question provides the option to “agree” or “disagree” by degrees (i.e. “agree strongly”, “tend to agree” etc.) the “combined” figure represents the total percentage of all those agreeing.

“Net” figures refer to the percentage of people expressing one view minus the percentage holding the opposite view; thus the “net agree” figure is based on the proportion agreeing minus the proportion disagreeing.

Where percentages do not add up to 100, this may be due to rounding values to the nearest integer, the exclusion of “don’t know” categories, or multi-choice questions in which each value is out of 100%.



### 13.4 Error Margins

Findings are subject to the normal error margins for sample surveys - these are small for relatively large sample sizes. YouGov provides extensive tabular analysis; this can result in relatively small numbers of respondents in some sub-samples. Some findings may be drawn from small sub-samples for which the margins of error may be high (see statistical reliability below). Care should be taken when interpreting findings based on answers from a small number of respondents. On the tables of results are the weighted and unweighted number of respondents.

### 13.5 Statistical reliability

The respondents to the questionnaire are only samples of the total “population”, so we cannot be certain that the figures obtained are exactly those we would have if everybody had been interviewed (the “true” values). We can however, predict the variation between the sample results and the “true” values from a knowledge of the size of the samples on which the results are based and the number of times a particular answer is given. The confidence with which we can make this prediction is usually chosen to be 95%. The chart below indicates the predicted ranges for different sample sizes and percentage results at the 95% confidence interval.

