

VII. STANDING COMMITTEES

A. Academic and Student Affairs Committee

In Joint Session with

B. Finance, Audit and Facilities Committee

Summary of UW 2012 Public Opinion Survey

INFORMATION ONLY

Attachment

Public Opinion Research – Community Views of the University of Washington



Public Opinion Research:

COMMUNITY VIEWS OF THE UNIVERSITY OF WASHINGTON

A-4.1/210-12
10/11/12

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Overall Research Objectives

Assess current public views of the UW

Measure against 2008, 2009 and 2010 baselines

Inform strategic UW decisions and identify focus areas

Frame internal and external communications

Methodology

Research conducted by Hanover Research, a research firm headquartered in Washington D.C. with extensive experience with higher education

Representative sample of registered Washington voters

Telephone interviews conducted in June 2012

548 interviews completed

- Industry-standard margin of error of 4.2% at a 95% confidence interval

People View the UW As ...

Positive

Connected

Impactful

Executive Summary

STRENGTHS

Overall **favorability** has increased considerably since 2010.

Across the board, 2012 ratings were generally **higher**.

More respondents now feel a **connection** to the University.

Executive Summary

CHALLENGES

Tuition and make-up of undergraduate student body: Opportunities to make public opinion more accurate.

Economic diversity: The UW is generally perceived as more responsive to ethnic diversity than to economic/financial diversity.

Perception that the UW is elitist and arrogant: While the number of people who disagree that the UW is elitist and arrogant increased, there is still a significant percentage of people who do perceive the UW this way.

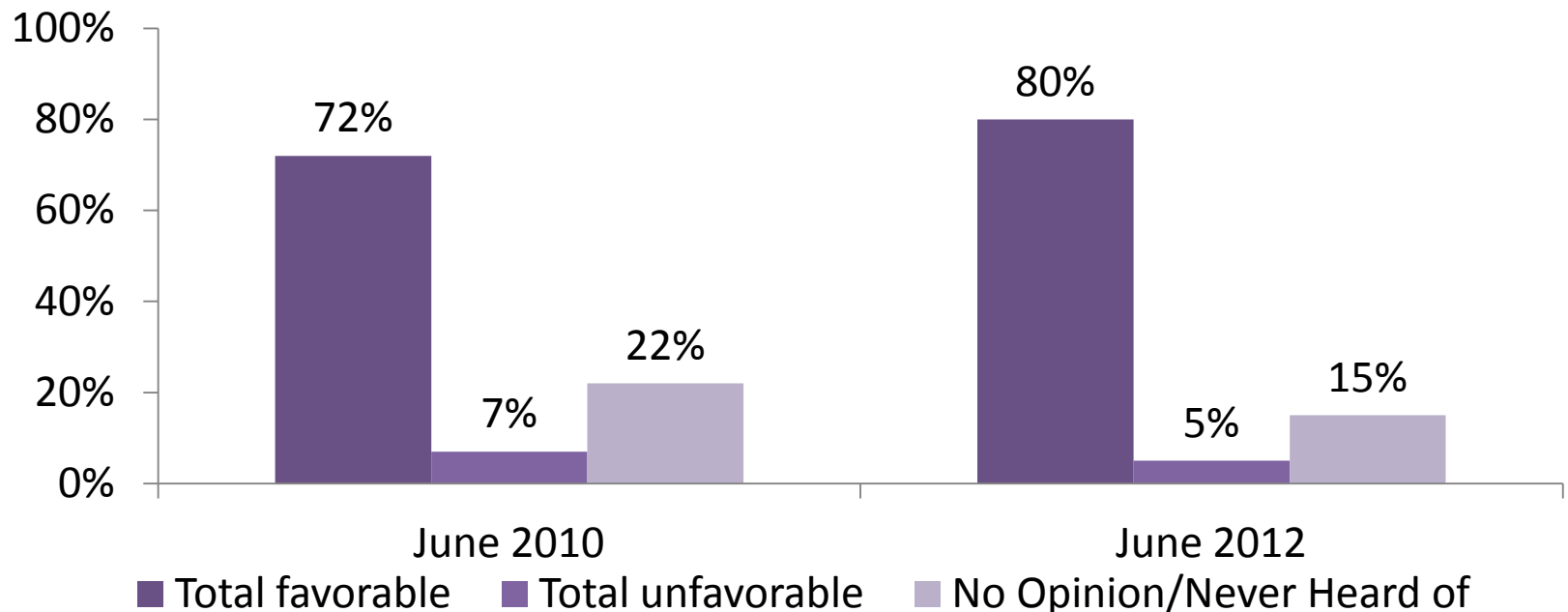
The UW's Image

OVERALL IMPRESSIONS AND FAVORABILITY

The UW's Image Trends Upward

Generally speaking, people view the UW positively. Overall favorability improved significantly since June 2010 – 80% of respondents view the UW favorably, with 46% of those reporting a very favorable view.

“In general, do you have a very favorable, a somewhat favorable, a somewhat unfavorable, or very unfavorable opinion of the University of Washington? If you have no opinion or have never heard of the University, just say so.”



Factors Affecting Favorability

BY REGION

Total	East	Kits/ Pierce Snoh	Non- Seattle King	Seattle	West
80%	71%	86%	88%	89%	79%

BY AGE GROUP

Total	18-34	35-44	45-54	55-64	65+
80%	66%	71%	82%	83%	88%

BY LENGTH OF RESIDENCE

Total	0-14 yrs	15+ yrs
80%	67%	85%

BY CONNECTION TO UW

Total	No	Yes
80%	68%	95%

BY GENDER

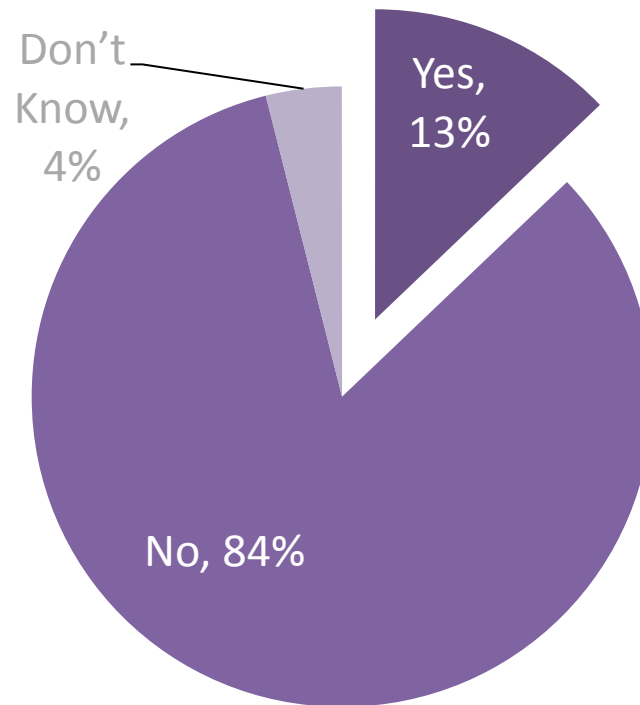
Total	Female	Male
80%	77%	85%

% Selecting “Very Favorable” or “Somewhat Favorable”

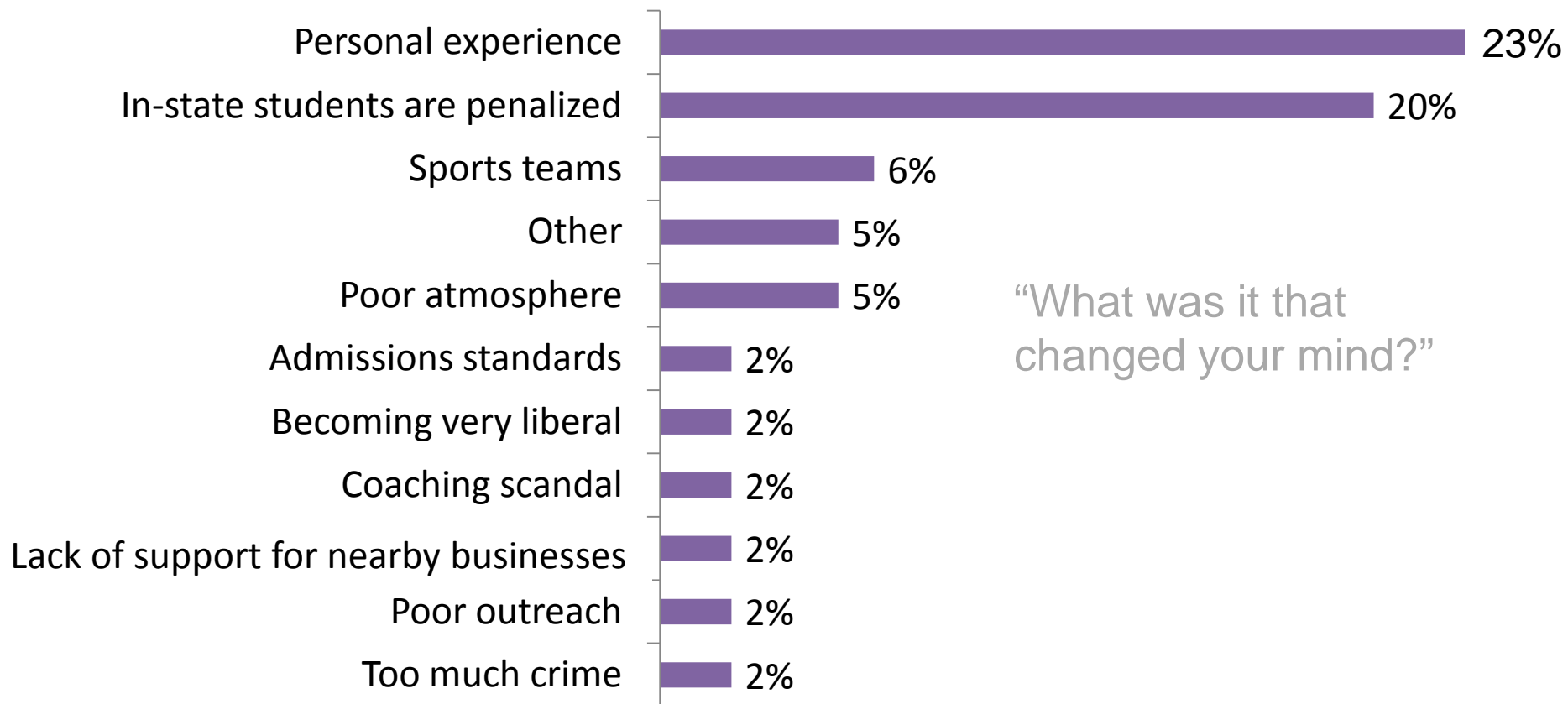
Perceptions Hold Steady

Overall perceptions did not significantly shift with most respondents (84%) reporting that they have not changed their opinion of the UW.

“Has your opinion of the University of Washington changed over the past year?”



Factors Influencing Change



Note: Small sample (n=65)

Academics Are Top of Mind

“What is the first thing that comes to your mind when you think about the University of Washington?”



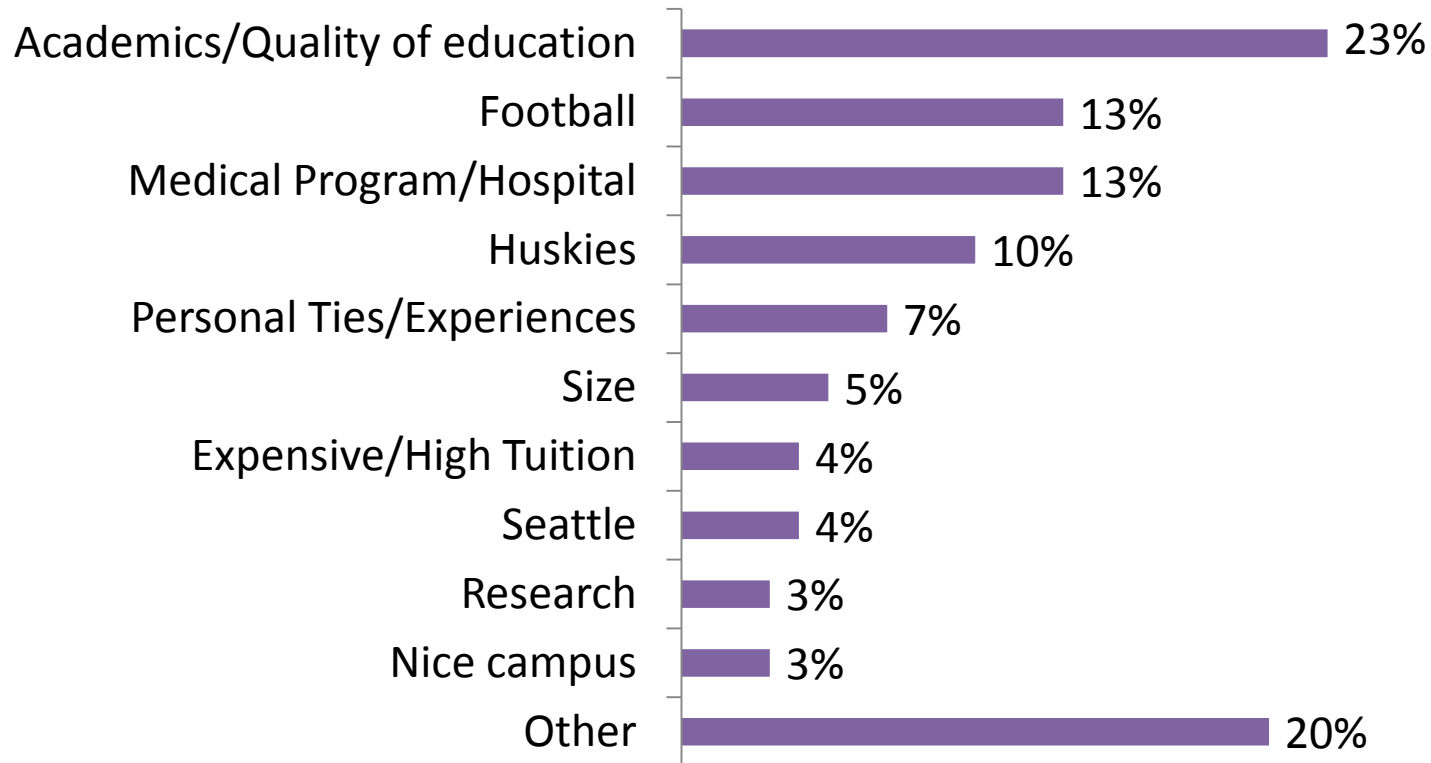
At a glance:

The most frequently cited associations with the UW include:

- Academics/ Quality of education
- Medical program/ Hospital
- Football/Huskies

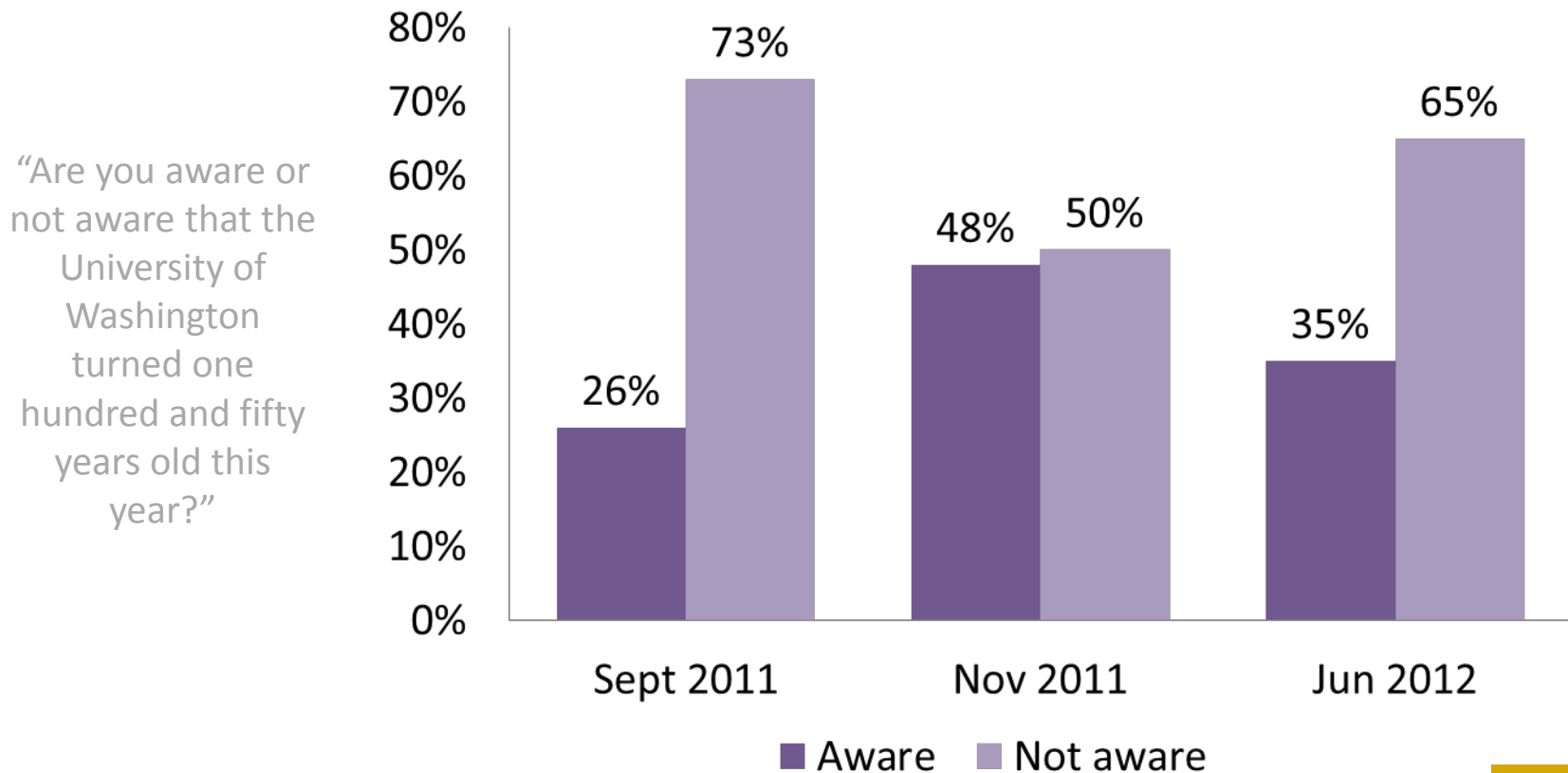
Primary Associations with the UW: Academics, Sports and Medical

“What is the first thing that comes to your mind when you think about the University of Washington?”



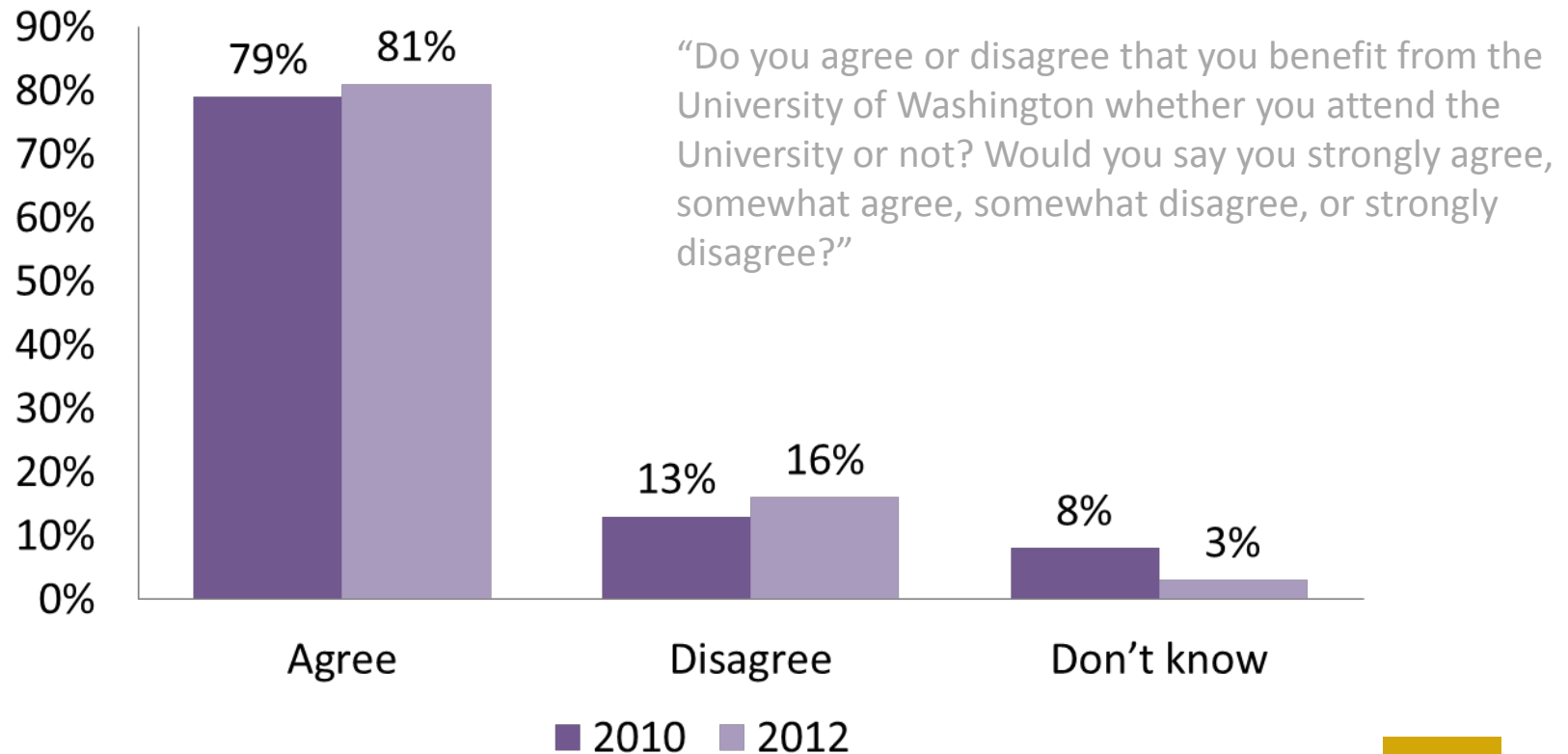
Awareness of 150th Anniversary

Awareness was measured over the course of the 150th year, with the highest awareness right after the 150th campaign



Making a Positive Impact—Statewide

The UW's positive impact is felt throughout the state. Regardless of whether or not they attended the UW, a majority of respondents believe they benefit from the University.



Benefits: Demographic Breakdown

Whether or not they attended the UW, the groups most likely to believe that they benefit from the University include: Seattle residents, voters who are well educated and have lived in the state for a long period, and liberals.

% Who Strongly Agree or Somewhat Agree

BY REGION

Total	East	Kits/Prce /Snoh. Cos.	Non- Seattle King	Seattle	West
82%	71%	79%	90%	98%	83%

BY YEARS OF
EDUCATION

Total	0-12 yrs	13-15 yrs	16 yrs	17+ years
82%	65%	77%	85%	90%

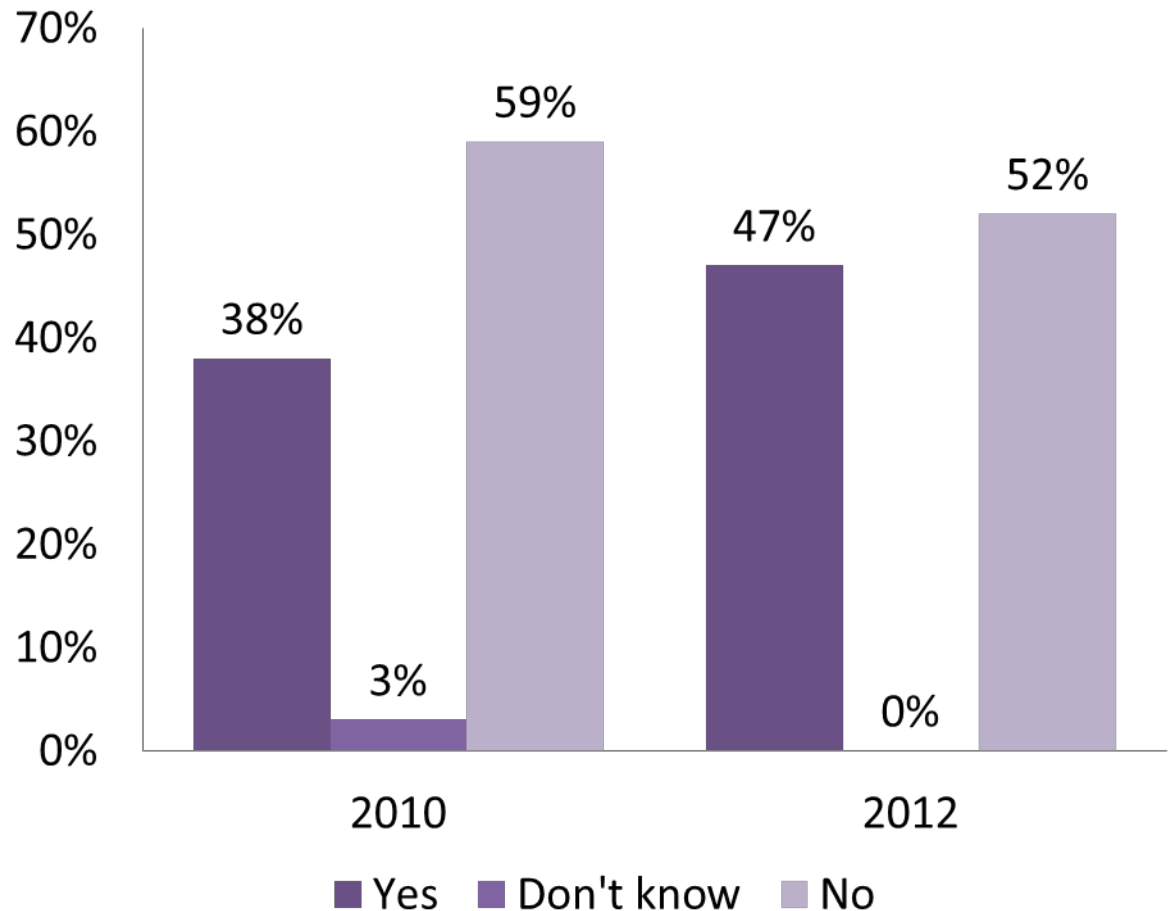
BY POLITICAL
VIEWS

Total	Conservative	Liberal	Moderate
82%	76%	88%	86%

Fostering Connections

“Do you feel you have a connection to the University of Washington, or not?”

In 2012, more respondents reported feeling a connection to the UW. Nearly half of all respondents indicated that this was the case (47%, up from 38% in 2010).



Connections Differ by Location, Income and Political Views

The groups most likely to report that they feel a connection to the UW include: voters who live close to the University, individuals with higher incomes, and voters with liberal political views.

BY REGION

Total	East	Kits/Prce/ Snoh. Cos.	Non- Seattle King	Seattle	West
47%	36%	48%	57%	67%	44%

BY HOUSEHOLD INCOME

Total	< 35K	35K-49K	50-74K	75-99K	Over 100K
47%	36%	39%	53%	56%	55%

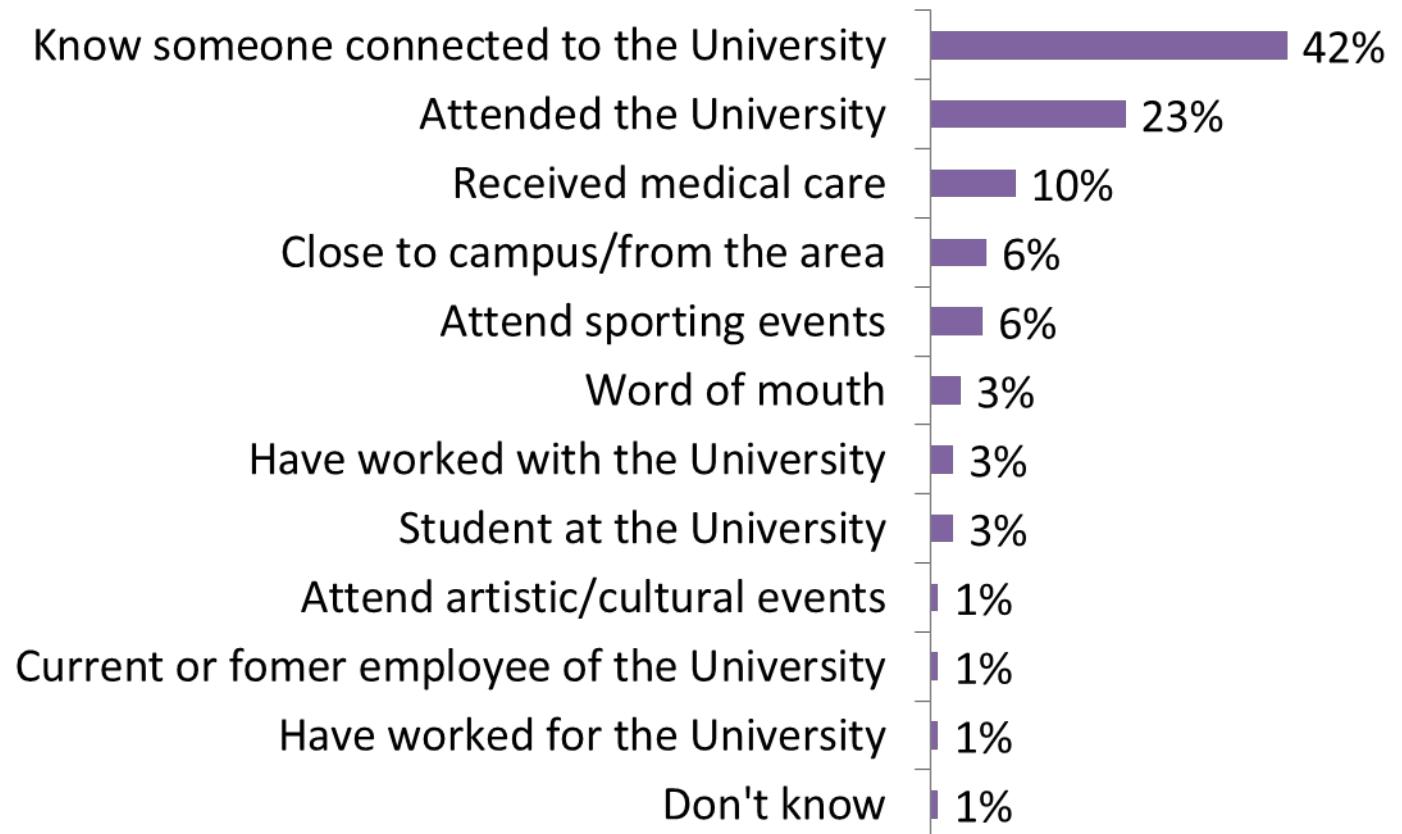
BY POLITICAL VIEWS

Total	Conservative	Liberal	Moderate
47%	46%	57%	39%

Maintaining Strong Personal Connections

As in previous years, most reported connections with the UW were of a personal nature.

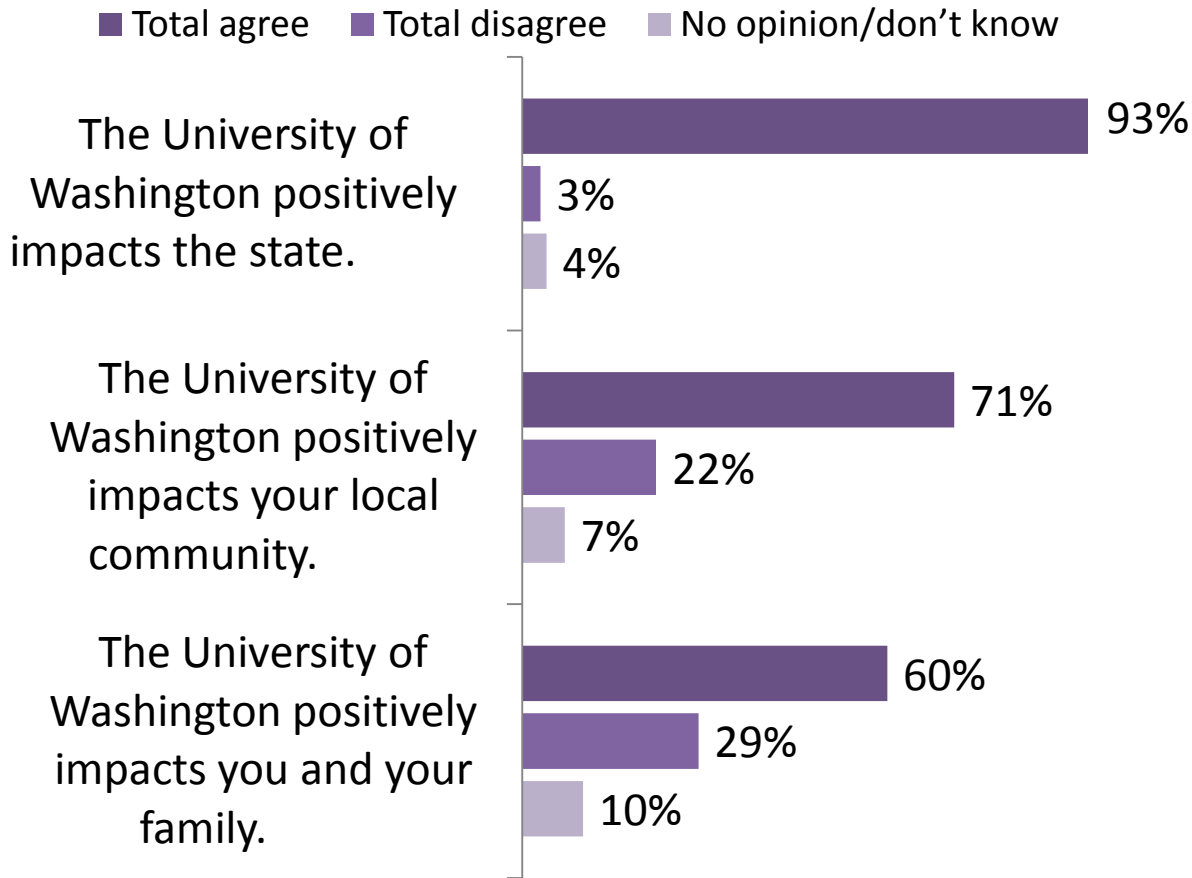
“What is that connection?”



Impact

THE UW'S IMPACT STATEWIDE, REGIONALLY AND LOCALLY

Near and Far-Reaching Impact



The state, local community and personal lives – according to a majority of respondents, the UW positively impacts all of these areas.

Impacting Places *and* People

More people than in previous years reported that the UW has a **positive impact** on the state of Washington and on them personally.

% Who Agree

	2008	2010	2012
The University of Washington positively impacts the state.	89%	90%	93%
The University of Washington positively impacts your local community.	68%	72%	71%
The University of Washington positively impacts you and your family.	53%	53%	60%

Going Beyond our Backyard

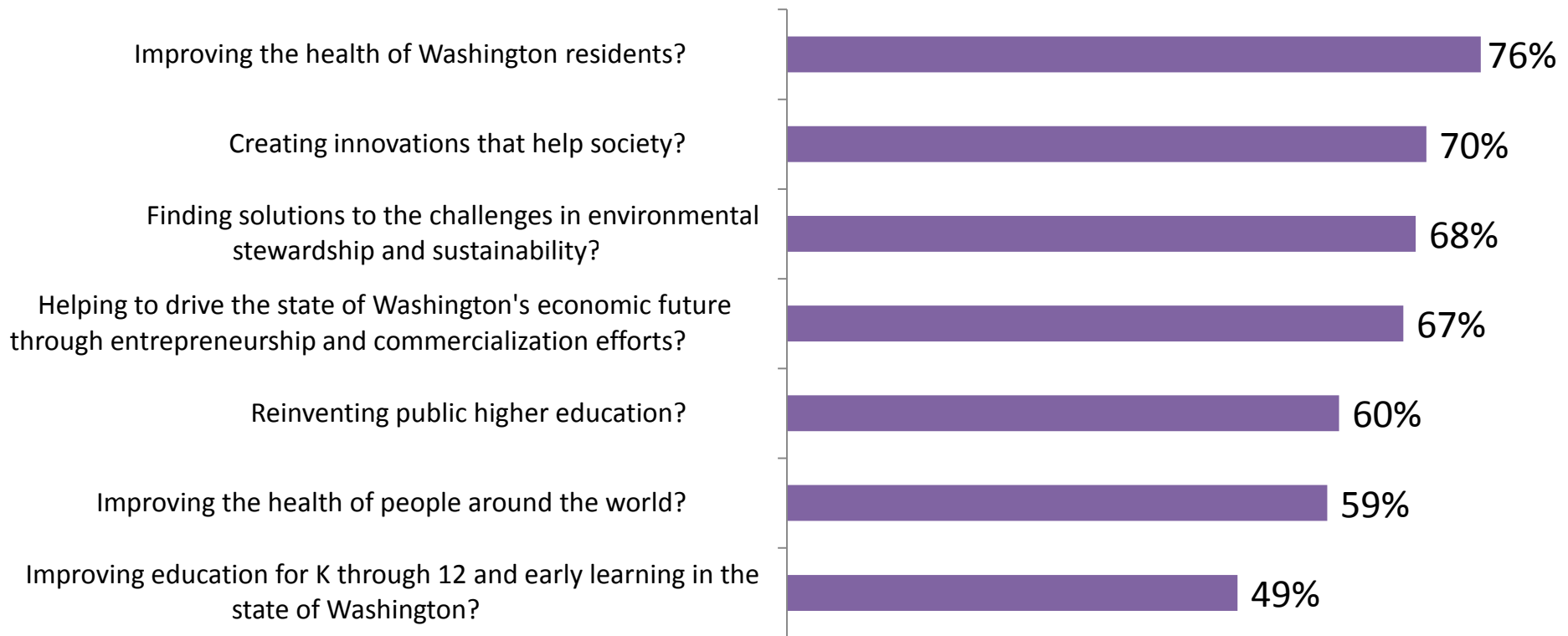
Perception of the UW's positive impact extends beyond Seattle. Across the state of Washington, respondents in all five regions report that the University positively impacts the state.

% Who Agree

	Total	East	Kits/Prce/ Snoh. Cos.	Non-Seattle King Co	Seattle	West
The University of Washington positively impacts the state.	93%	95%	95%	94%	89%	94%
The University of Washington positively impacts your local community.	71%	53%	77%	86%	89%	67%
The University of Washington positively impacts you and your family.	60%	48%	64%	70%	76%	60%

From Health to Education: Perceptions of the UW's Impact Vary

How much of an impact do you think the UW has on...



% Indicating Significant or Moderate Impact

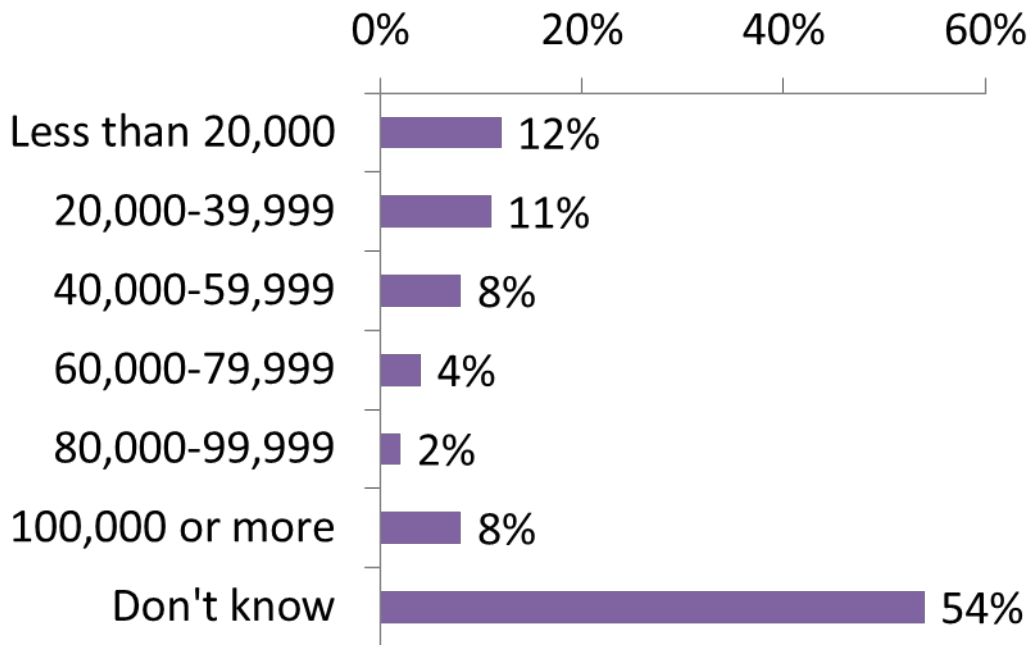
Regional Perceptions of the UW's Impact

% Who Selected Moderate or Significant Impact

How much of an impact do you think the UW has on...	Total	East	Kits/Prce/ Snoh. Cos.	Non-Seattle King Co	Seattle	West
Reinventing public higher education?	60%	62%	60%	59%	63%	58%
Improving the health of people around the world?	59%	62%	61%	49%	48%	64%
Improving education for K through 12 and early learning in the state of Washington?	49%	53%	43%	38%	58%	53%

Generating Jobs in Washington State

“To the best of your knowledge, how many jobs in the state are generated by the University of Washington - including University of Washington jobs and jobs created in support of University of Washington's workforce and visitors?”



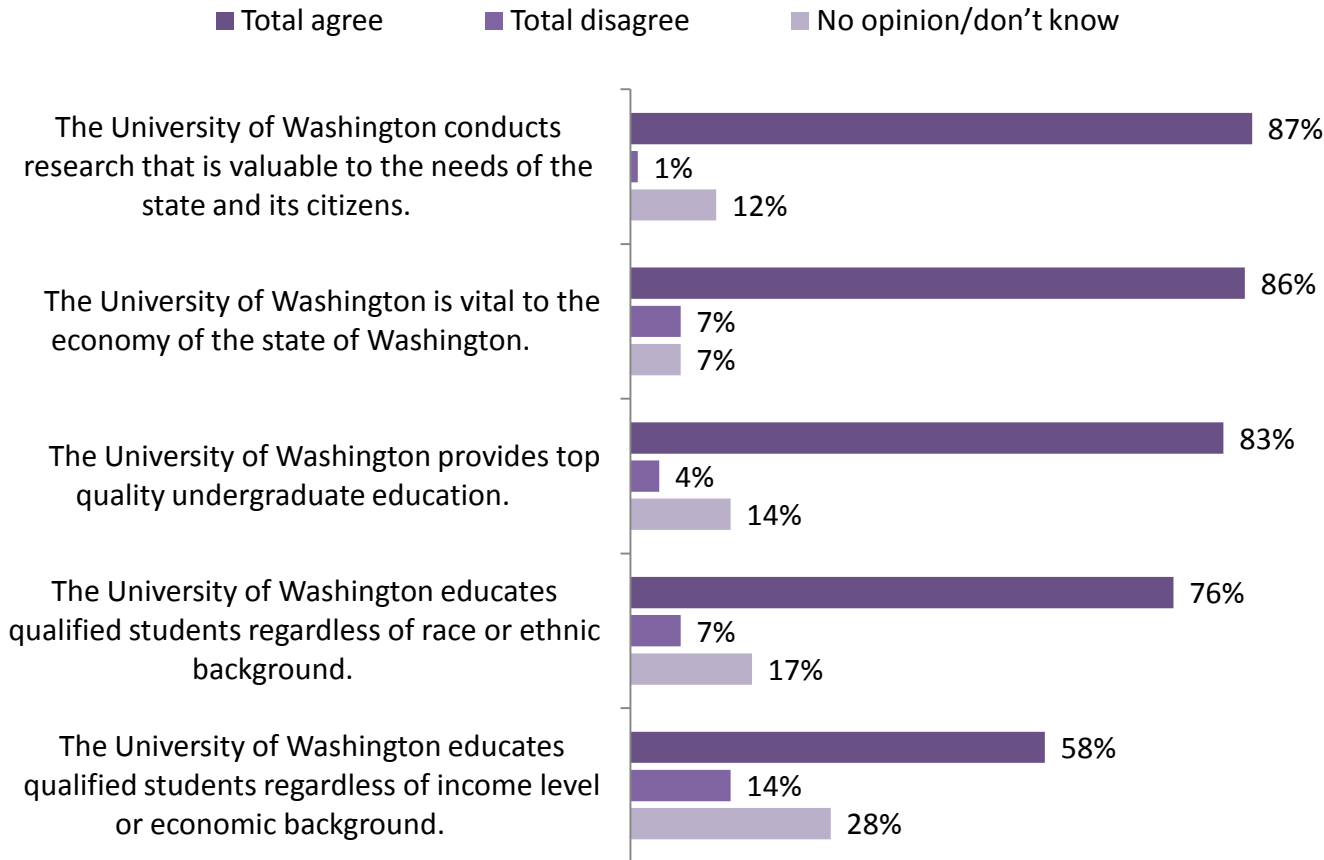
There was no clear consensus among voters as to how many jobs the UW generates in the state.

A plurality believe that the University creates fewer than 20,000 jobs. This represents an area of opportunity to improve the public's awareness of the UW's significant role as a creator of 70,000 jobs (direct and indirect).

Perceptions

WHAT ARE PEOPLE'S PERCEPTIONS
OF THE UW IN KEY FOCUS AREAS?

Identifying Gaps in Perceptions



Strengths:

Respondents favorably view the UW's research, economic impact and quality of education.

Challenges:

Fewer respondents believe that the University educates qualified students regardless of their income level or economic background.

Perceptions Improve in Key Areas

In all five focus areas, ratings improved compared to previous years.

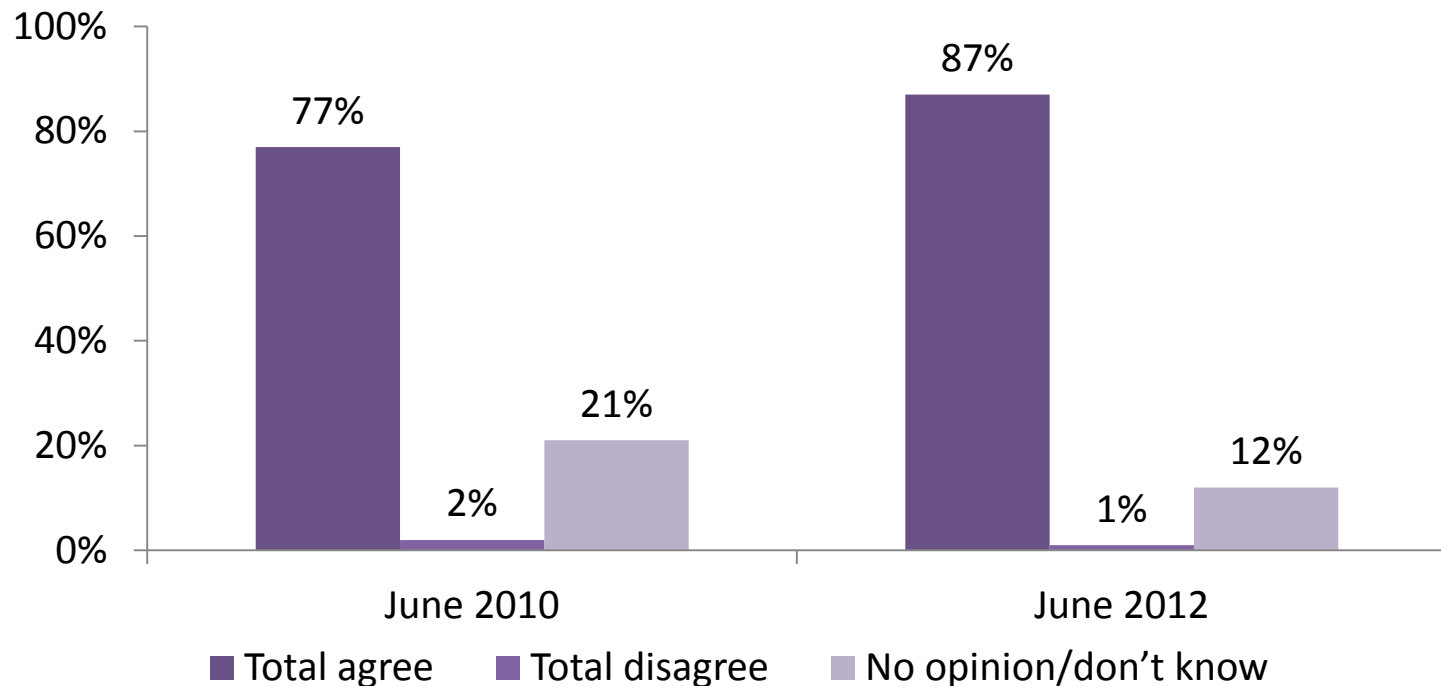
% Who Agree

	June 2008	June 2010	June 2012
The University of Washington conducts research that is valuable to the needs of the state and its citizens.	82%	77%	87%
The University of Washington is vital to the economy of the state of Washington.	80%	81%	86%
The University of Washington provides top quality undergraduate education.	78%	74%	83%
The University of Washington educates qualified students regardless of race or ethnic background.	80%	72%	76%
The University of Washington educates qualified students regardless of income level or economic background.	56%	52%	58%

The UW Conducts Meaningful Research

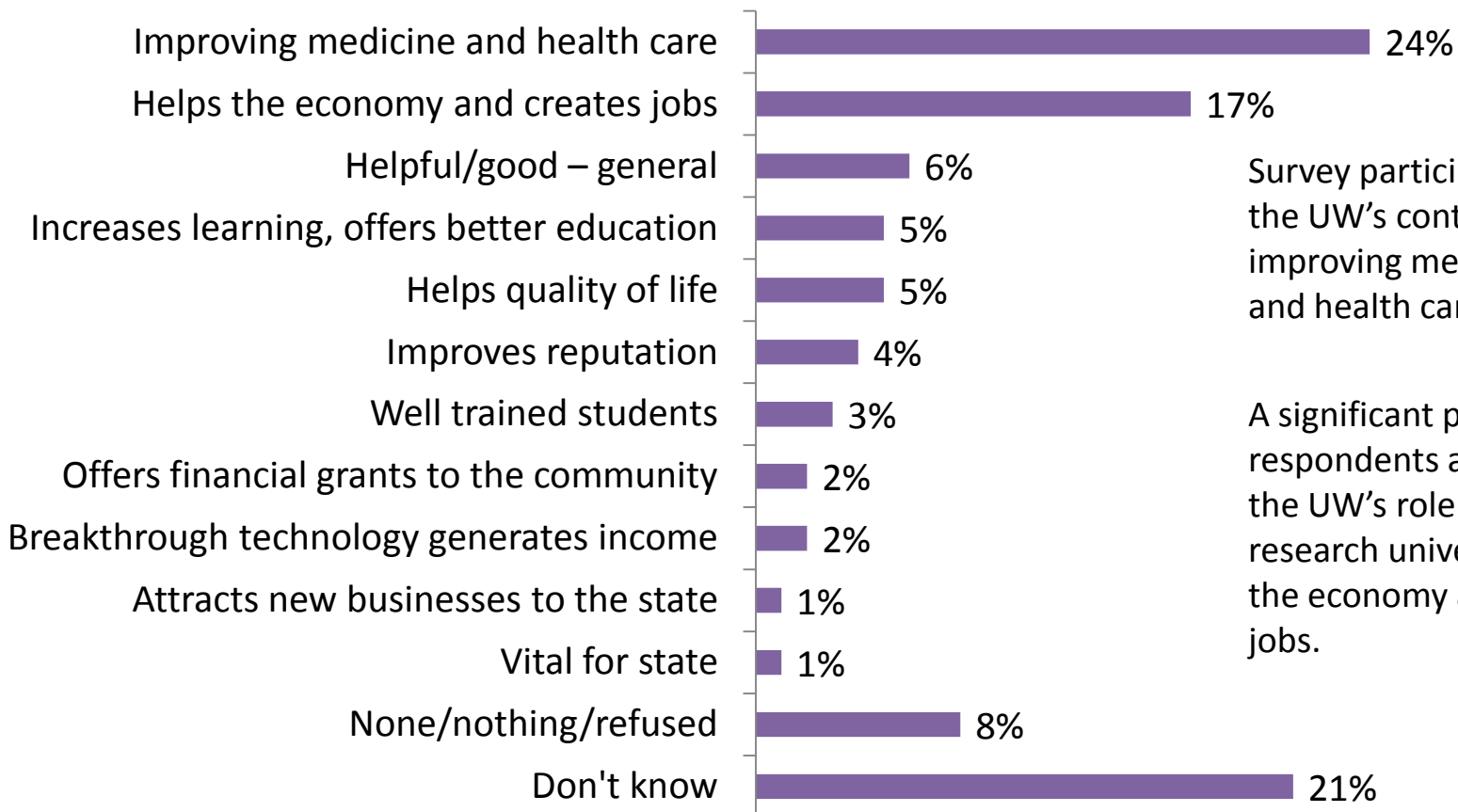
More people held favorable views of the value of the UW's research compared to 2010.

“The University of Washington conducts research that is valuable to the needs of the state and its citizens.”



Positive Views of Our Research Role

“As you may know, the University of Washington is a major research university. What, in your opinion is the major benefit of this for the state of Washington?”

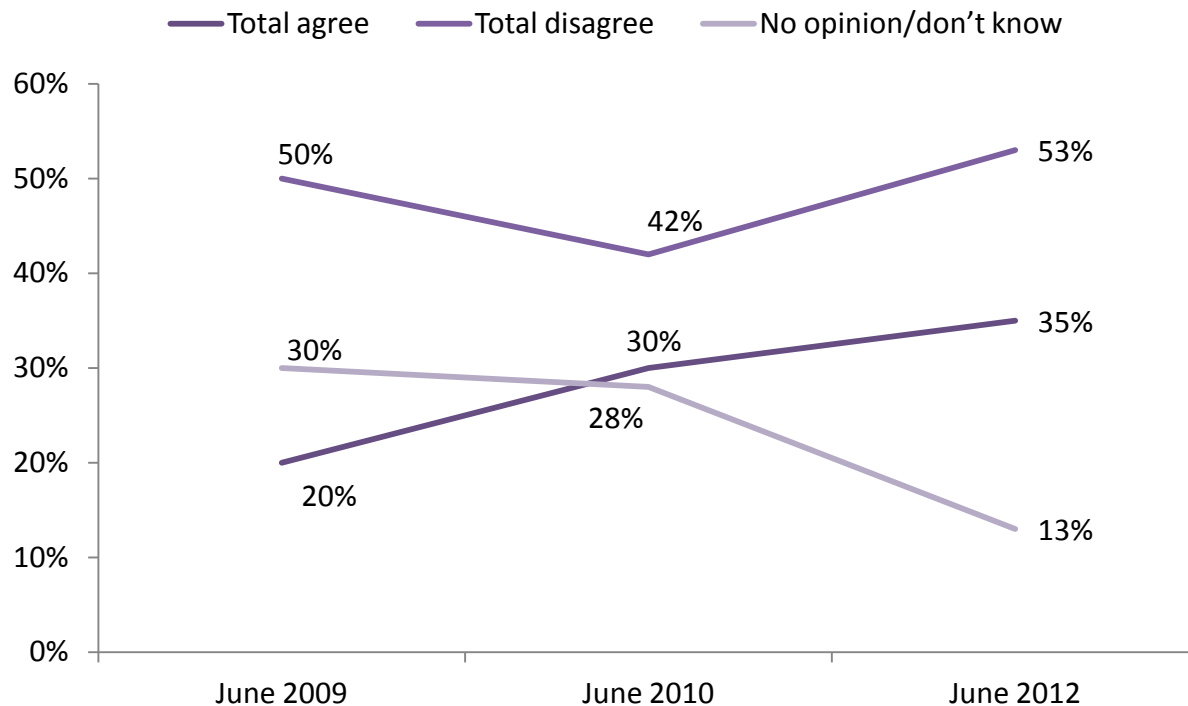


Survey participants recognize the UW’s contributions to improving medicine and health care.

A significant percentage of respondents also believe that the UW’s role as a major research university benefits the economy and helps create jobs.

Moderate Improvements in Perceptions of the UW as “Elitist” and “Arrogant”

“Please tell me if you strongly agree, somewhat agree, somewhat disagree or strongly disagree with the following statement: The University of Washington is elitist and arrogant in its attitudes.”



Perceptions Differ by Region

Survey participants in Eastern Washington, non-Caucasians, and respondents who have been in the state for a long period are more likely to perceive the UW as being “elitist and arrogant in its attitudes.”

BY REGION

Total	East	Kits/Prce /Snoh. Cos.	Non-Seattle King	Seattle	West
35%	43%	41%	27%	33%	26%

BY ETHNIC ORIGIN

Total	Caucasian	Non-Caucasian
35%	31%	48%

BY LENGTH OF RESIDENCE

Total	0-14 yrs	15+ yrs
35%	24%	36%

Financial Issues

PERCEPTIONS REGARDING TUITION,
ADMISSIONS AND FUNDING ISSUES

Many Remain Unclear on Costs

Thirty percent (30%) of respondents hold accurate views of tuition/fees for in-state students, correctly identifying the cost between \$10,000 and \$14,999.

What do you think are the costs of tuition and fees for one year of undergraduate education at the University of Washington for an IN-STATE student?

Year Tuition	2008 \$6,385	2010 \$7,692	2012 \$10,574
Less than \$5,000	2%	2%	1%
\$5,000 - \$9,999	20%	18%	10%
\$10,000 - \$14,999	18%	25%	30%
\$15,000 - \$19,999	19%	22%	27%
\$20,000 or more a year	15%	20%	22%
Don't know	25%	13%	9%

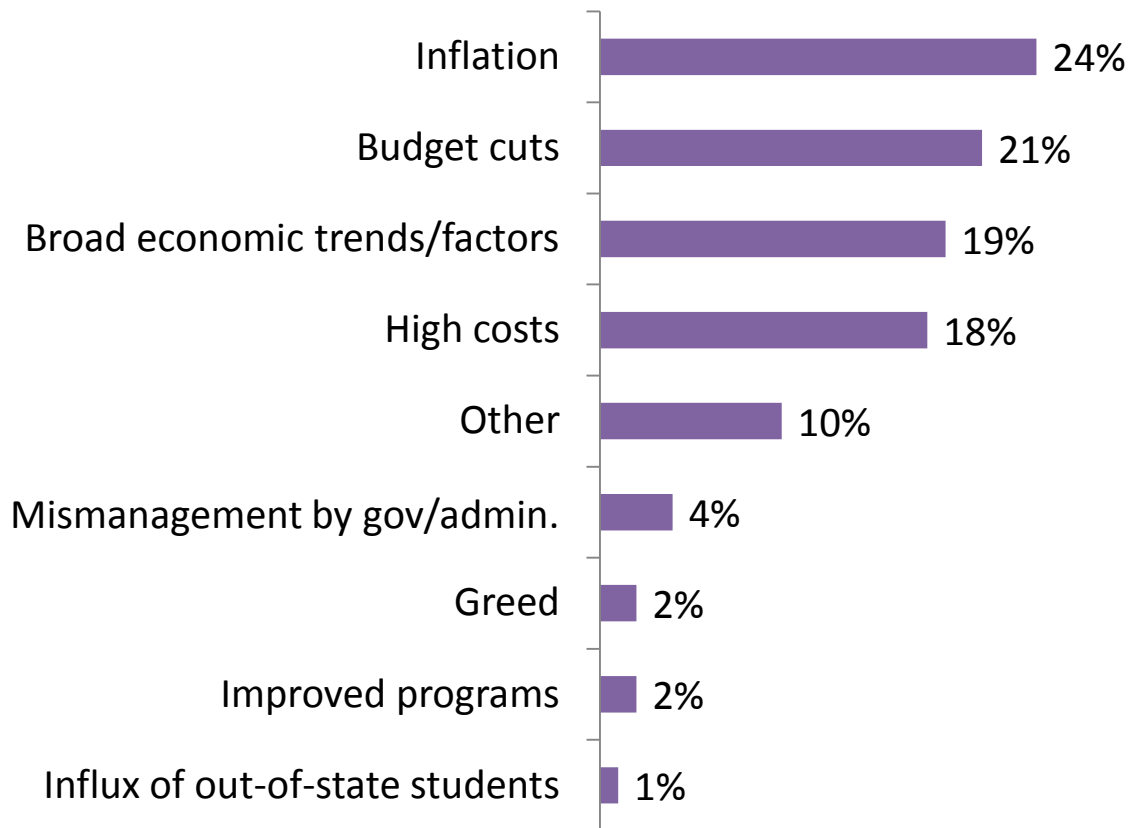
Lack of Awareness of In-State and International Students

Survey respondents are largely unaware of the extent to which the UW serves undergraduate in-state students. While the average response was 58%, in actuality 80% of the UW's students are from Washington. Respondents also overestimate the number of international undergraduate students on campus. While the average response was 22%, in actuality 8.7% of UW students come from other countries

	Average	Actual
To the best of your knowledge, what percentage of University of Washington undergraduate students are from the state of Washington?	58%	80%
To the best of your knowledge, what percentage of University of Washington undergraduate students are international students?	22%	8.7%
To the best of your knowledge, what percentage of funds does the state government cover to educate University of Washington undergraduate students?	27%	30%
To the best of your knowledge, what percentage of undergraduate students attending the University of Washington get some sort of financial aid?	61%	More than 60%

Many Attribute Tuition Increases to Inflation and Budget Cuts

“What is the primary reason that UW students pay a higher tuition today than in the past?”



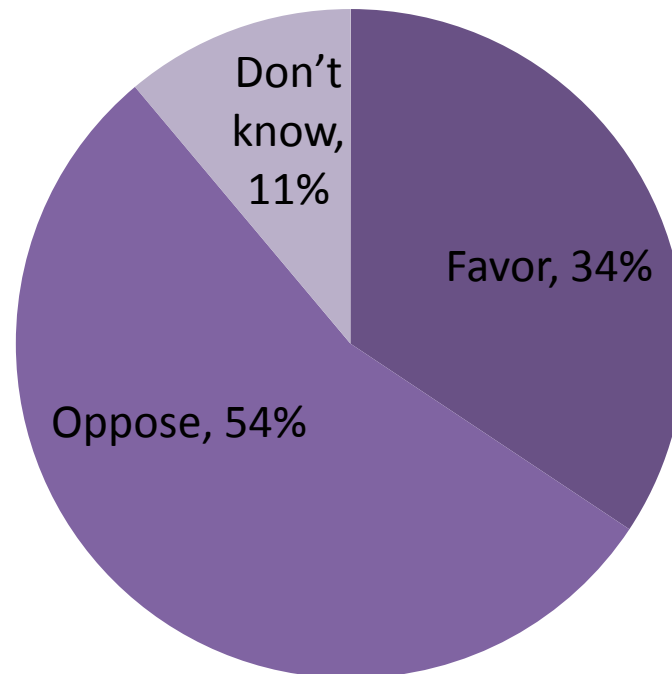
Respondents were most likely to cite inflation as the primary reason that UW students pay higher tuition today.

Many respondents also cited budget cuts and broad economic trends/factors.

Differential Tuition Model

More than half of those surveyed oppose a differential tuition model.

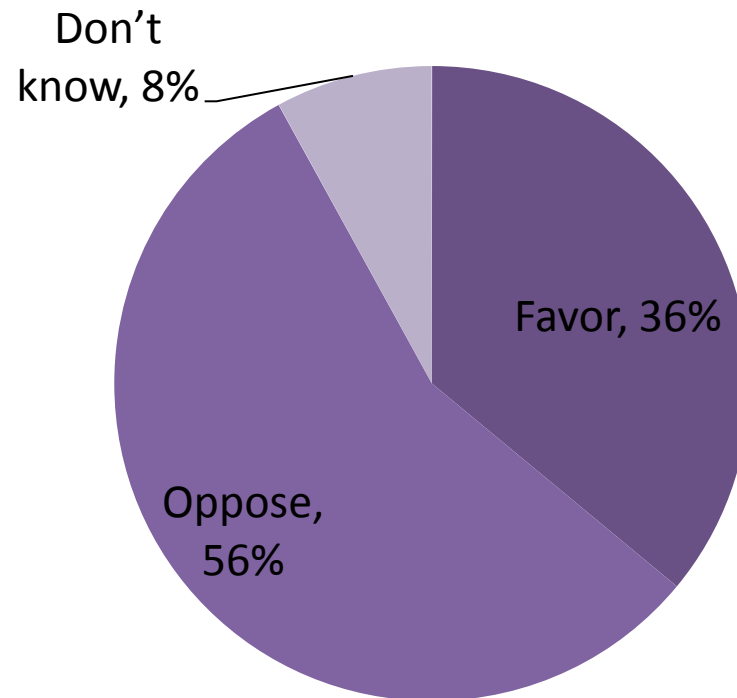
“Now here are some proposals to help the University of Washington address budget cuts. Please tell me if you favor or oppose each: Use a differential tuition model where students pay a higher or lower tuition based on area of study, for example by college, school, major.”



Admissions Changes to Subsidize In-State Tuition

A majority of respondents (56%) oppose a proposal to admit more out of state and international students in order to subsidize tuition for Washington residents.

“Now here are some proposals to help the University of Washington address budget cuts. Please tell me if you favor or oppose each: Admit more out of state and international students in order to get the higher tuition they pay and use that to subsidize tuition for Washington residents.”



Athletics and Husky Stadium Funding

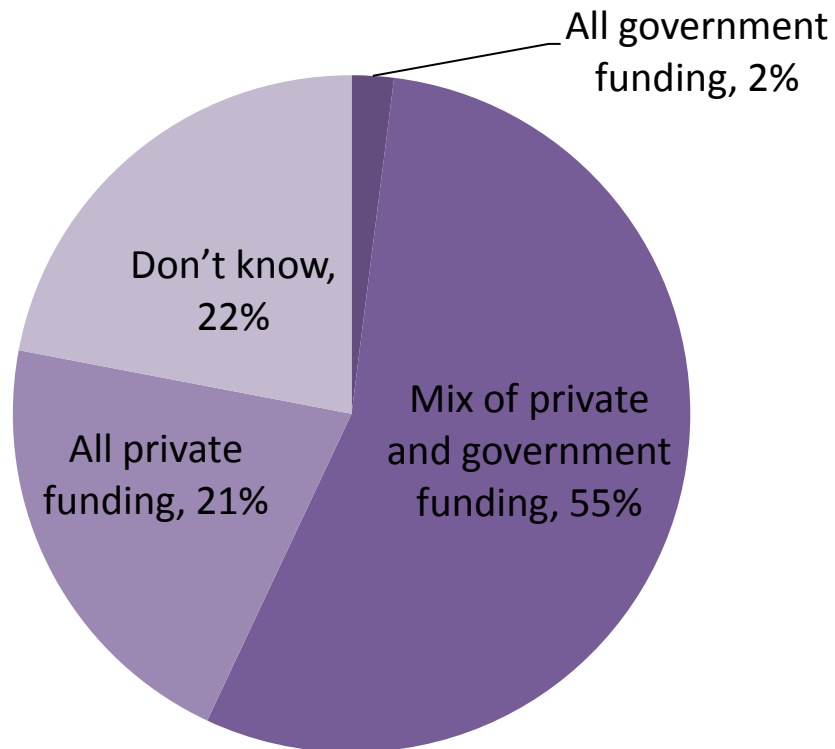
It is still not clear to the public that Athletics is not subsidized by the UW or tax payers.

Average	
To the best of your knowledge, what percentage of the athletic department's budget comes from taxpayer dollars?	26%

Athletics and Husky Stadium Funding

Many voters believe that the Husky Stadium renovation project will require the use of at least some public funds.

“To the best of your knowledge, how is the Husky Stadium renovation being funded?”



Budget Priorities

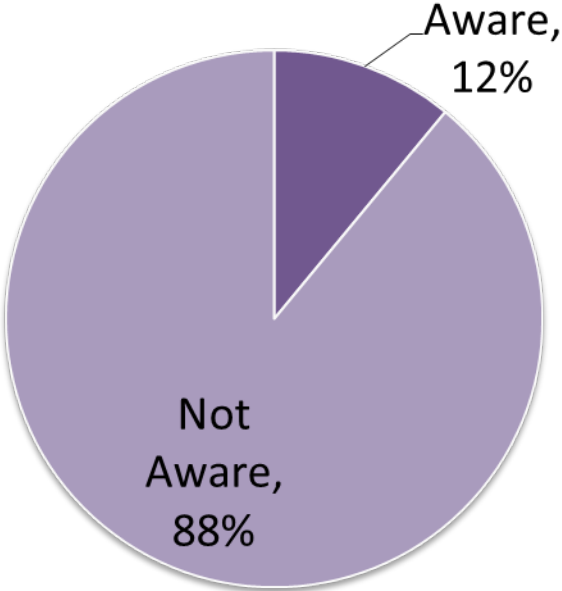
“As the state is recovering from economic challenges, which of the following do you think should receive the highest priority for investment by the state?”

	June 2009	June 2010	June 2012
K-12 schools	40%	43%	33%
Basic health	20%	17%	14%
Public safety	8%	10%	9%
Two-year community colleges	8%	6%	9%
Four-year state universities	4%	6%	8%
Other	2%	1%	8%
Social services	8%	6%	6%
Transportation	3%	4%	4%
Don't know	7%	6%	9%

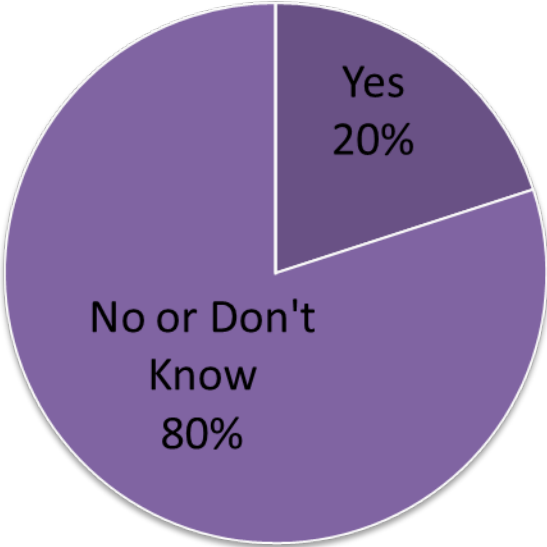
Support for Higher Ed: The Seattle Times' Greater Good Campaign

Within Seattle and King County, 12% of respondents were aware of The Seattle Times' Greater Good Campaign. Of those who were aware, 20% report that it increased their level of support for higher education in the state.

Are you aware or not aware of The Seattle Times' Greater Good Campaign?



Has the campaign increased your level of support for funding higher education in the state of Washington?



Focus Areas

The survey indicates positive momentum in many regards as the UW's overall favorability rankings increased and more people feel connected to the University.

The research also illuminates areas where we need to work to improve the public's understanding. These focus areas include:

- The UW's impact on job creation
- Tuition and make-up of undergraduate student body
- Economic diversity
- Perception that the UW is elitist and arrogant

Questions?