



Results of a national online survey of 800 adults

July 2013

**ANZALONE
LISZT
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Methodology

A survey of 800 adults was conducted online.

Interviews were conducted March 22-28, 2013. Interviews were apportioned geographically and demographically based on Census data. Because the survey was conducted online, all respondents owned a computer and had internet access.

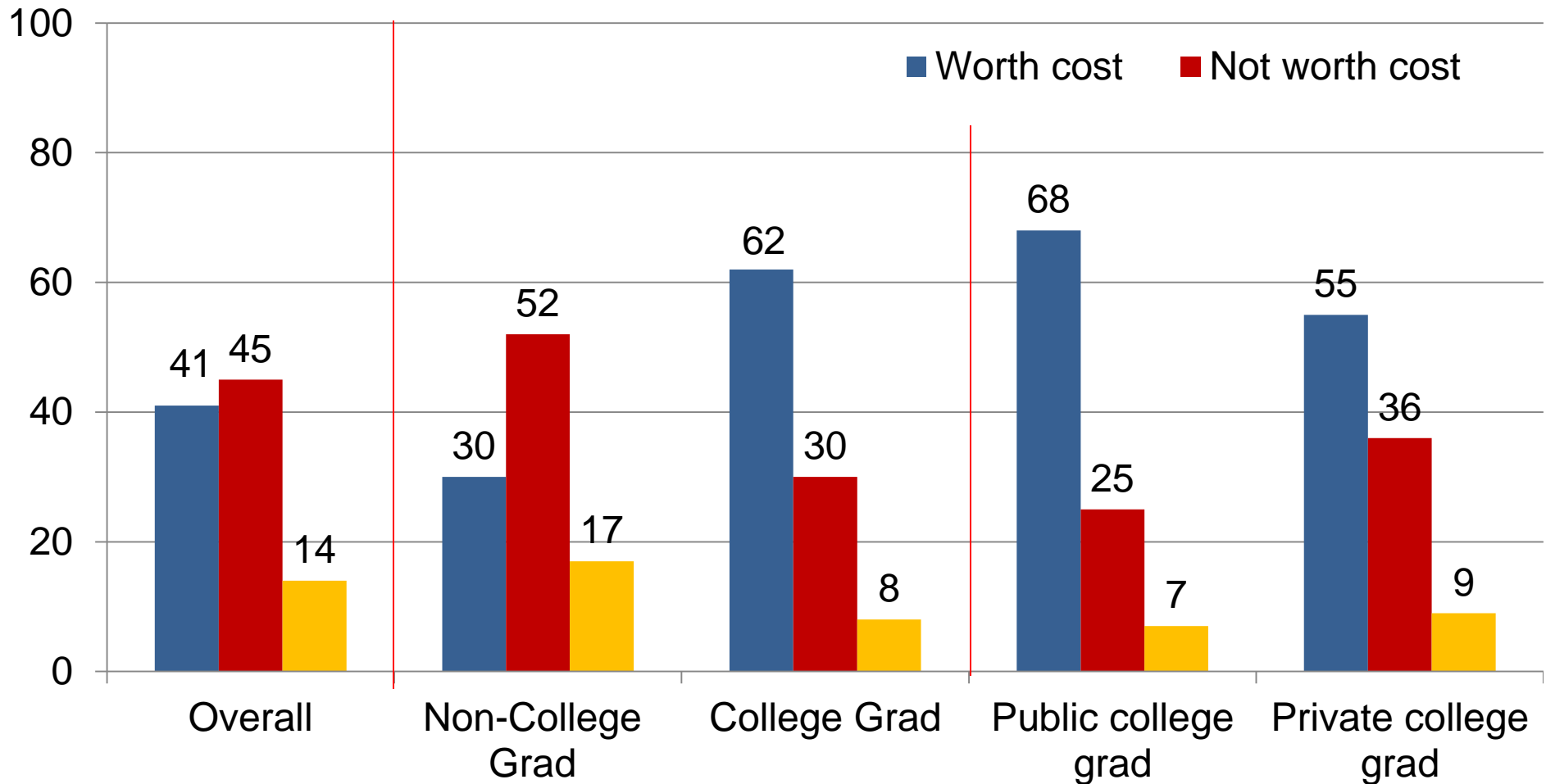
When asked about AASCU schools (public comprehensive colleges and universities) each respondent was given examples of three AASCU schools in their state. In states with less than three AASCU schools, all AASCU schools were used.

Current Environment



The public is split on whether college is worth the cost, with a major divide by level of education. Among college grads 62% believe it is worth it, compared to just 30% of non-college grads. *Public grads much more likely than private grads to believe its worth it*

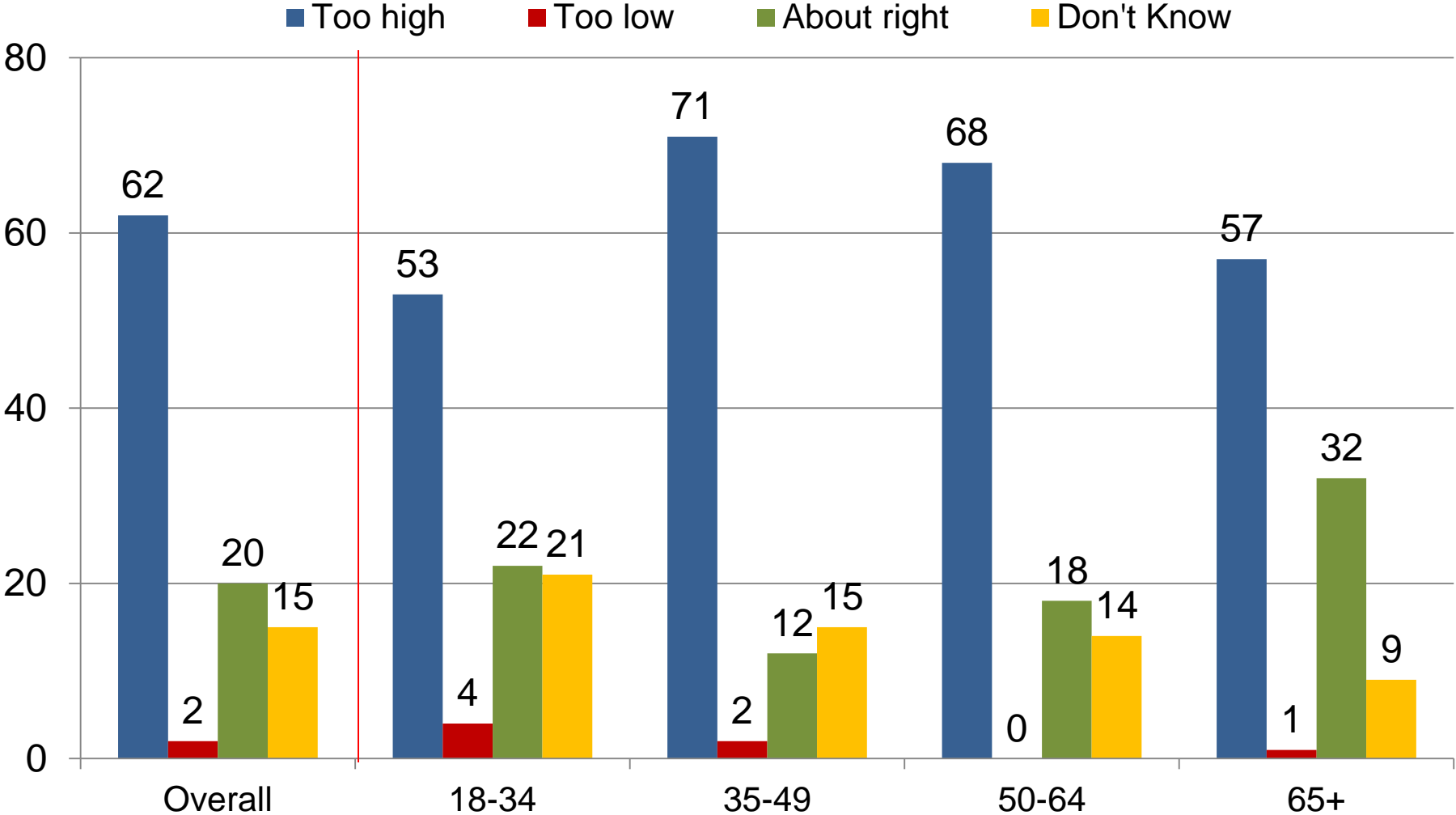
Is College Worth the Cost?: Overall and by Education



Over 60% of adults believe the cost of tuition at public colleges is too high.

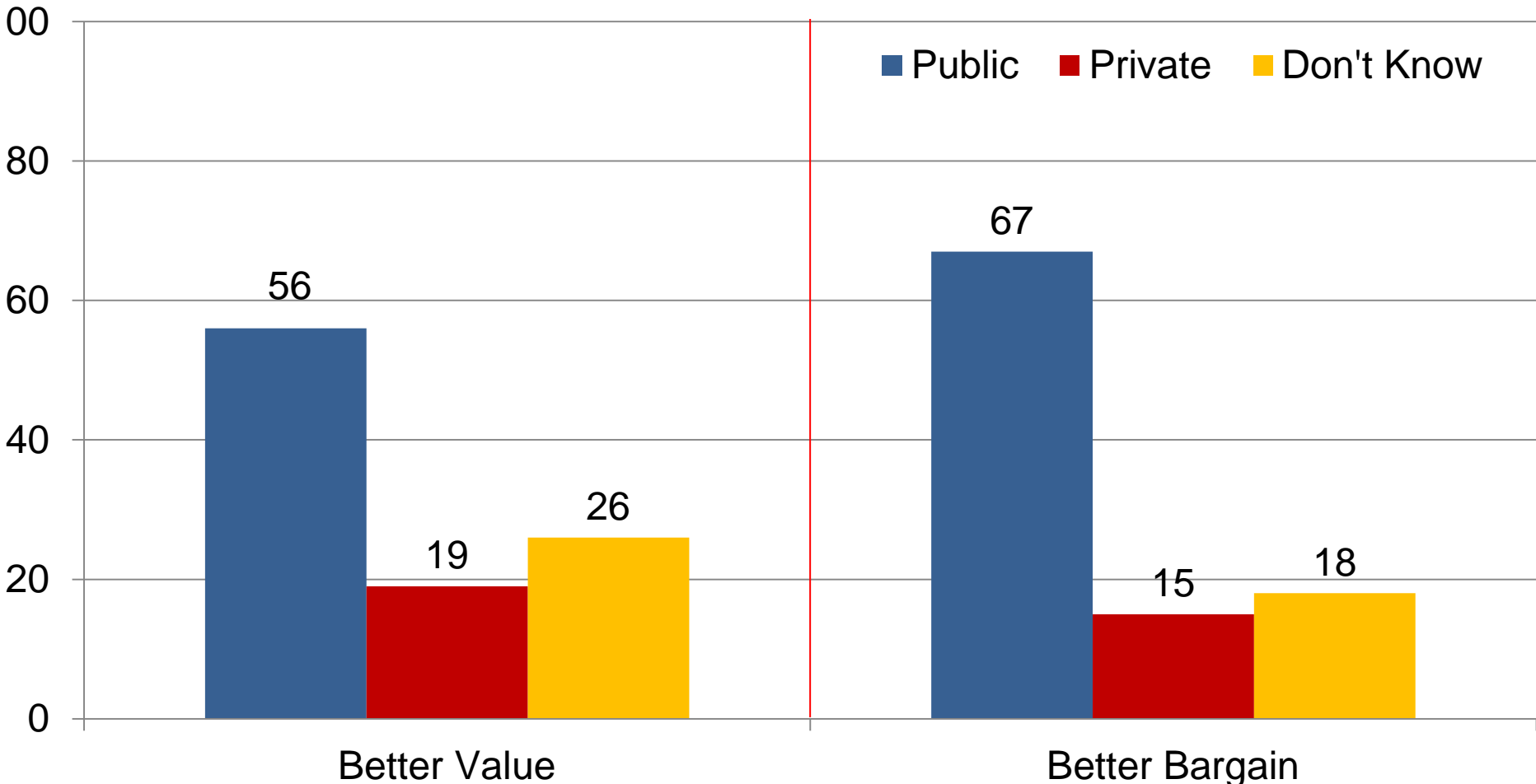
Those ages 35-64 are especially concerned about the cost of tuition

Cost of Tuition at Public Colleges: Overall and by Age



Still, public colleges are overwhelmingly seen as a better value than private colleges, and have an even bigger advantage when it comes to which is the better bargain.

Public vs. Private Colleges: Better Value vs. Better Bargain



In our poll, communities of color made up a majority of those with children under 18 who are likely to attend college.

Hispanics made up 28%, more than double their share now.

A majority of households of future college attendees had incomes below \$50K

Demographics of Likely Future College Attendees

	Current (census)	Households with children likely to attend college*
White	65%	47%
African American	15%	19%
Hispanic/Latino	12%	28%
Asian-American	6%	6%
HH Income Under \$50K	n/a	52%

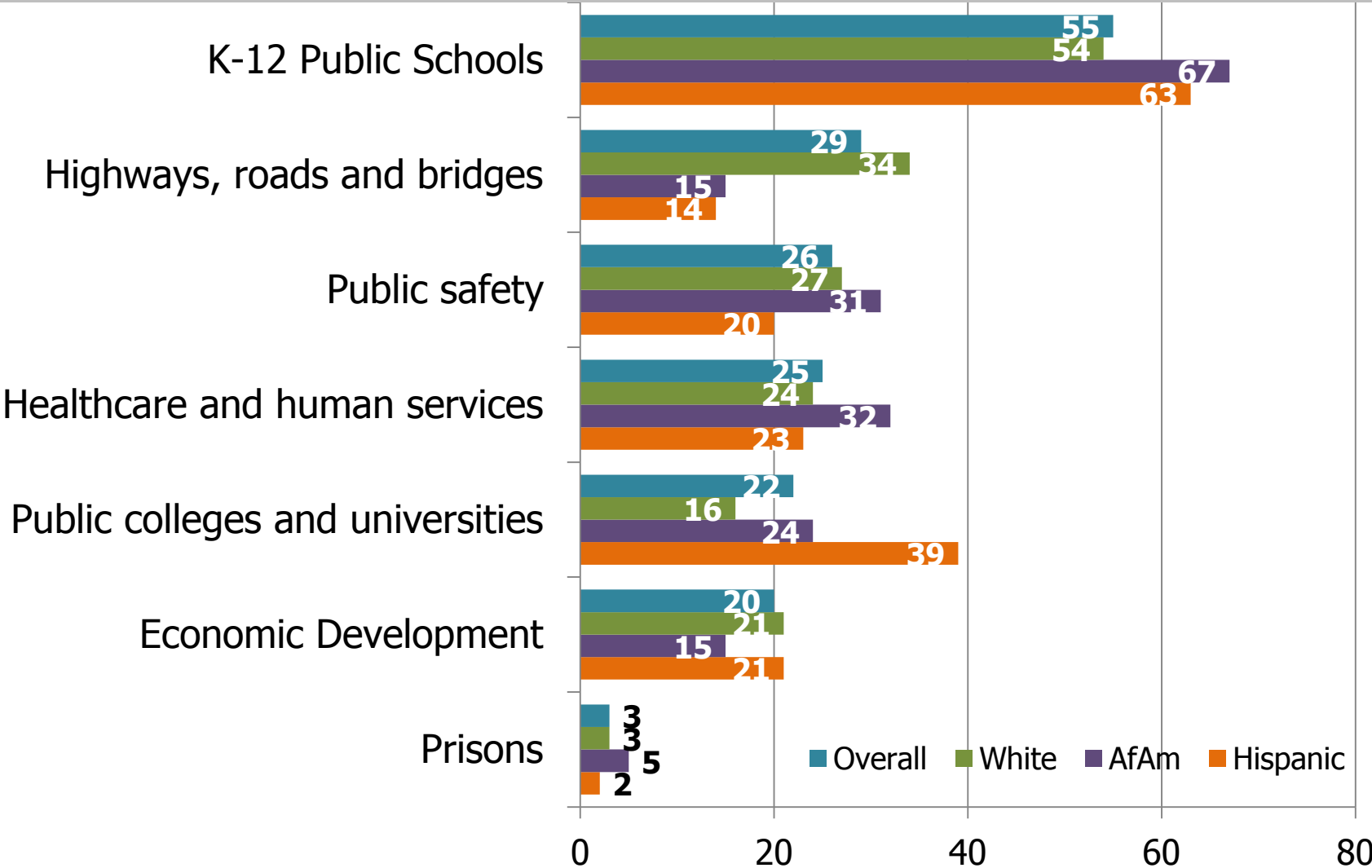
**Based on poll results of parents of children under the age of 18 who they say are likely to attend college*

Views on Funding



The public sees K-12 education as the biggest funding priority for their state, with Higher Ed and other areas well behind it. *But among Hispanics Higher Ed is the second biggest funding priority*

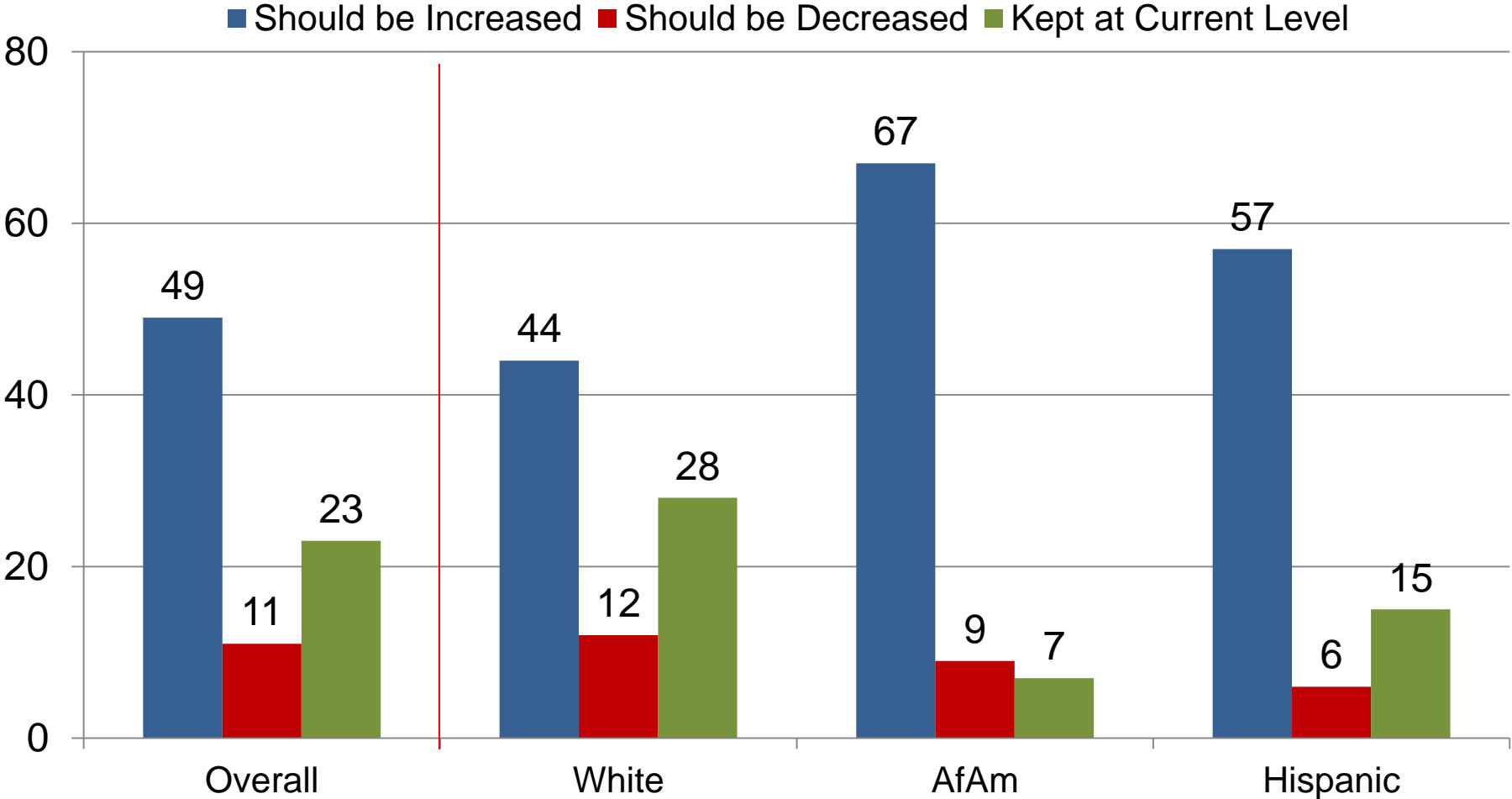
State Funding Priorities: Overall and by Race



A plurality of Americans believe that the state should increase funding for public colleges.

Support for more funding is especially high with communities of color

State Funding for Public Colleges: Overall and by Race



Those most likely to support increased state funding for public colleges were Democrats, younger women and communities of color, while Republicans, men and independents were the least likely to support more funding.

Most Supportive of More State Funding

- Democrats 67%
- African Americans 67%
- Females 18-49 60%
- Kid likely to attend college 58%
- Hispanics 57%
- Female college grad 56%

Least Supportive of More State Funding

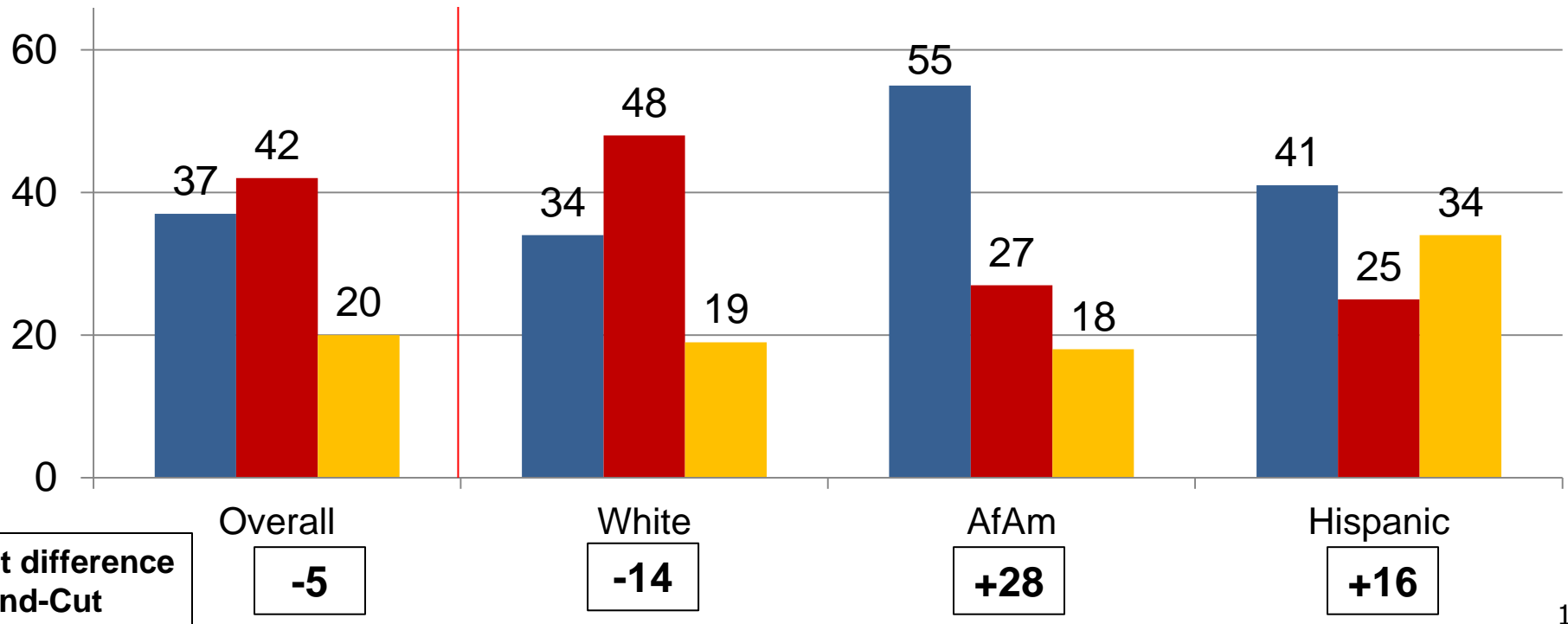
- Republicans 33%
- Men 43%
- HS or less 43%
- Independents 43%

In an engaged debate, support for increased funding for public colleges declines, with the public narrowly saying public colleges need to reduce spending.

Again, communities of color are much more likely to support more funding

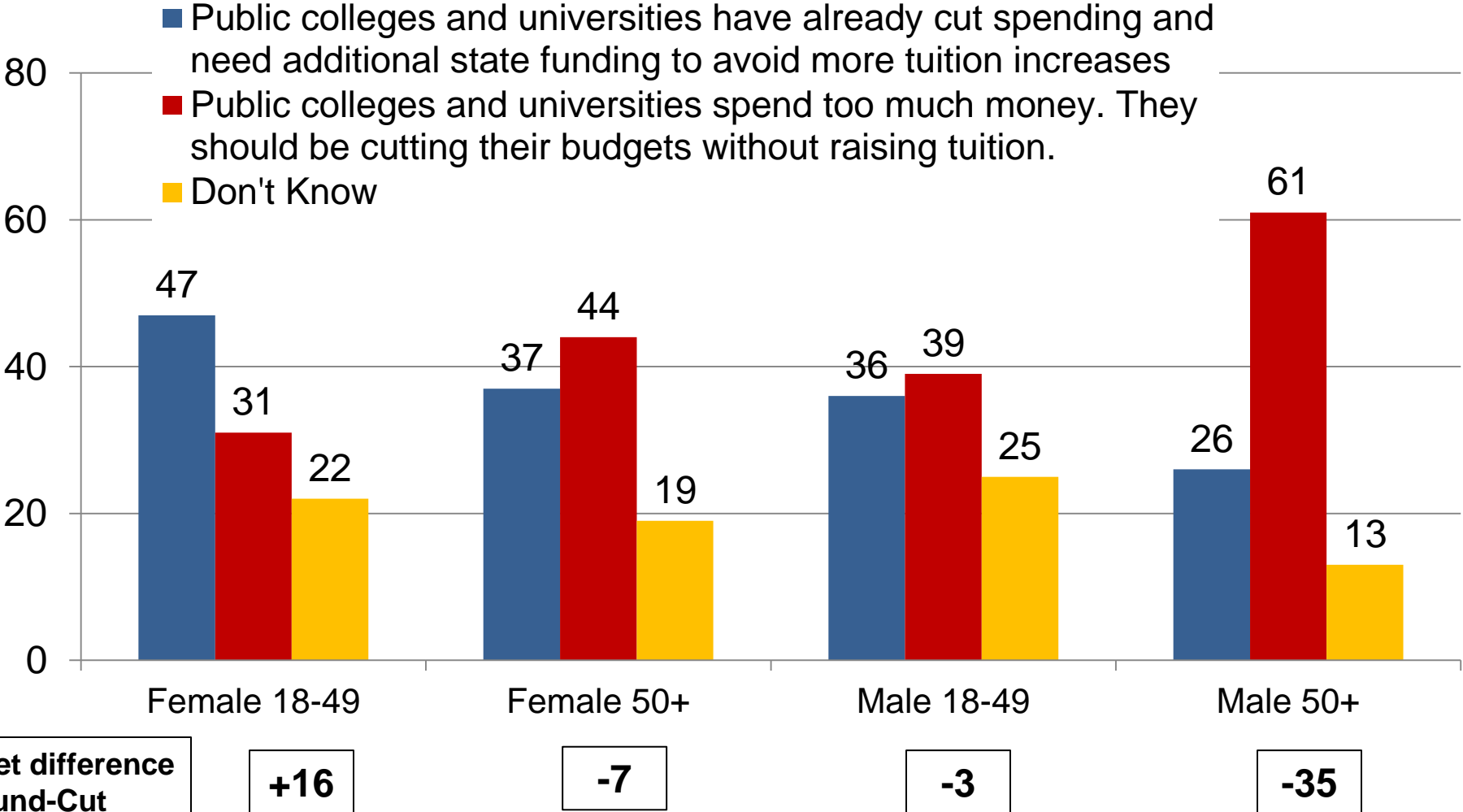
Public Colleges – More Funding vs. Cut Spending: Overall and by Race

- Public colleges and universities have already cut spending and need additional state funding to avoid more tuition increases
- Public colleges and universities spend too much money. They should be cutting their budgets without raising tuition
- Don't Know



There is a major divide along gender/age lines, with younger women supporting more funding by 16 points, while older men become strongly opposed.

Public Colleges – More Funding vs. Cut Spending: By Gender/Age



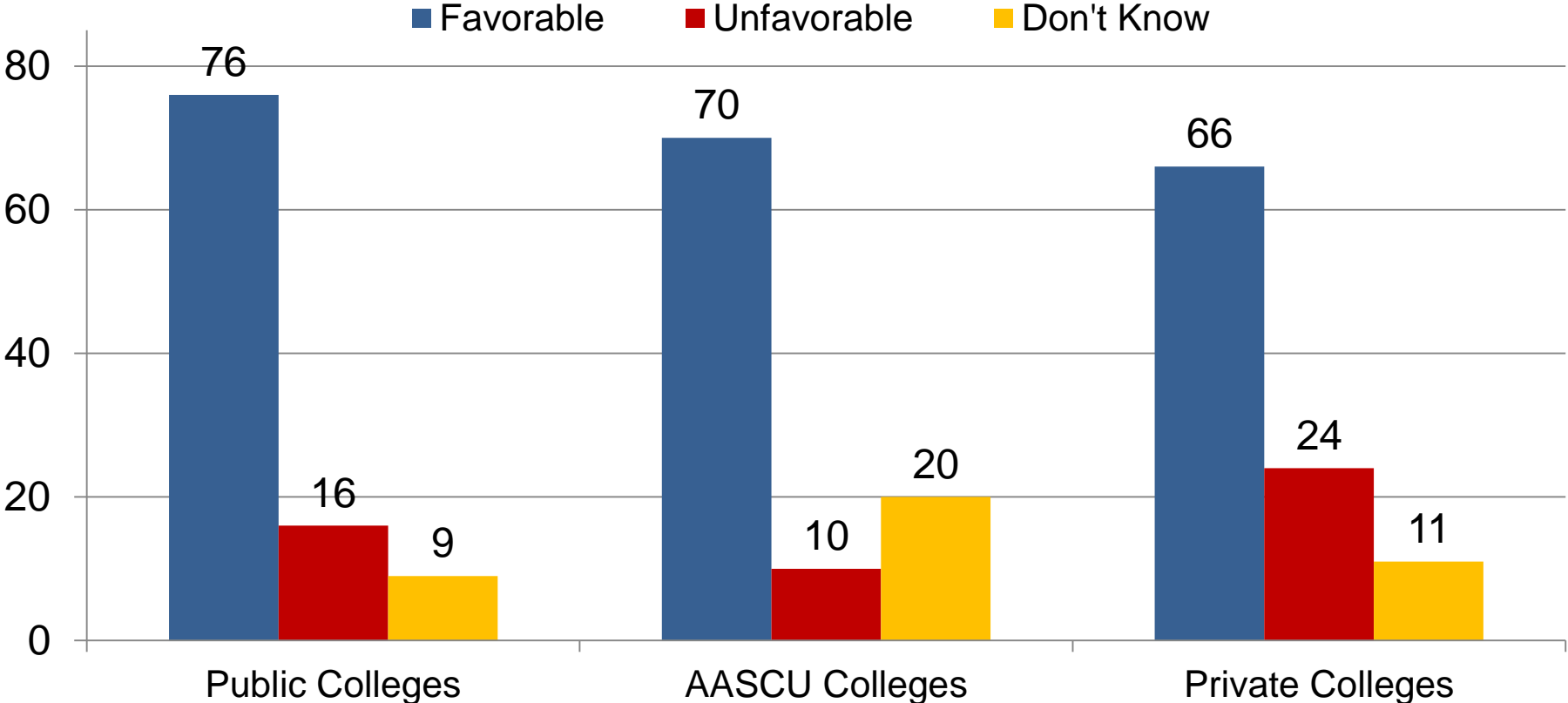
Views of AASCU Colleges and Universities



AASCU colleges are viewed favorably by 70% of the public, putting them just below public colleges generally, and just above private colleges.

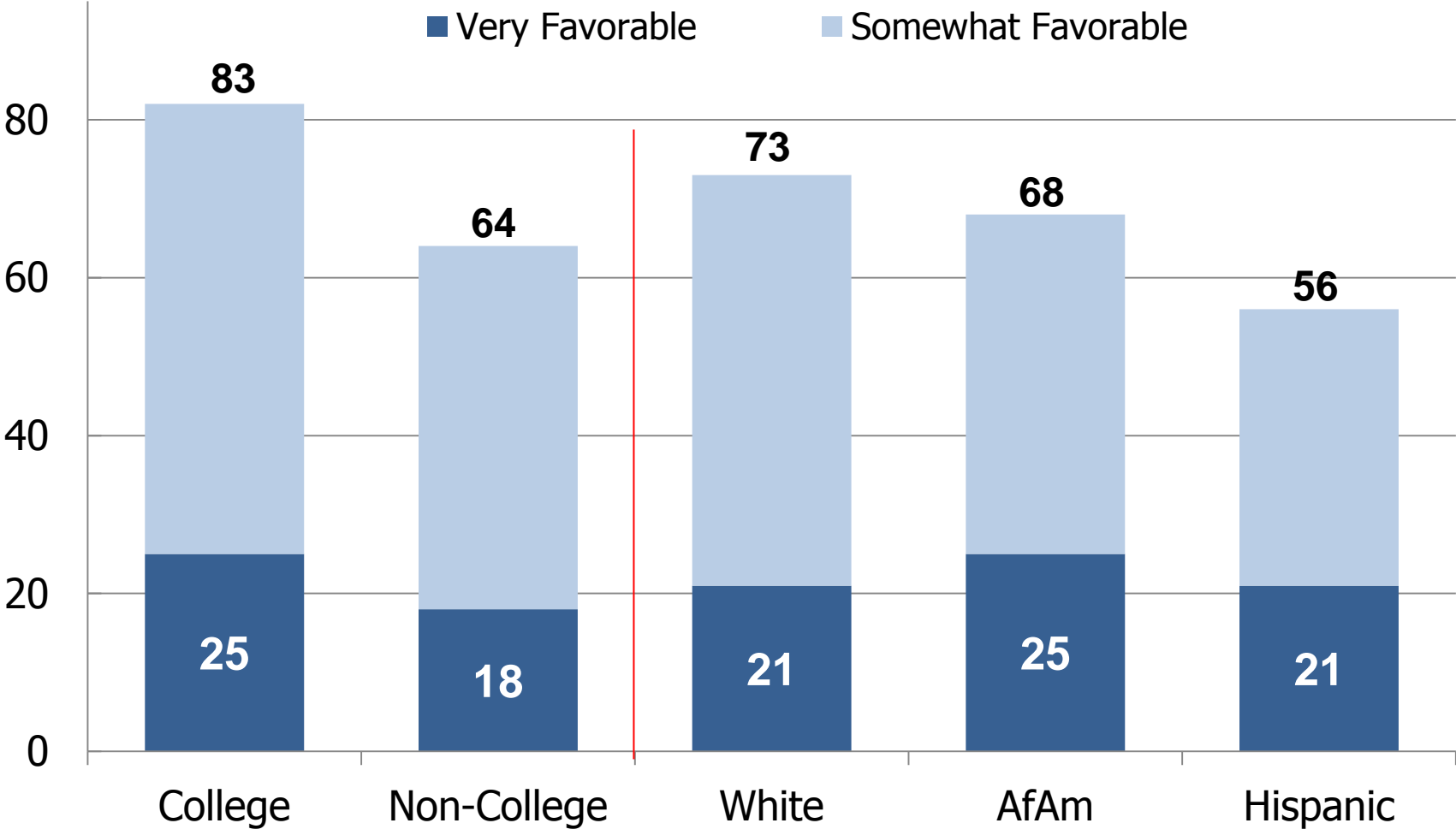
Popularity of AASCU Colleges Compared to Public and Private Colleges

“PUBLIC COMPREHENSIVE colleges and universities are schools that are focused on undergraduate and master’s programs, and less focused on PhD programs. [NAMES OF THREE AASCU SCHOOLS IN STATE] are all examples of PUBLIC COMPREHENSIVE universities in [STATE]. Do you have a...”



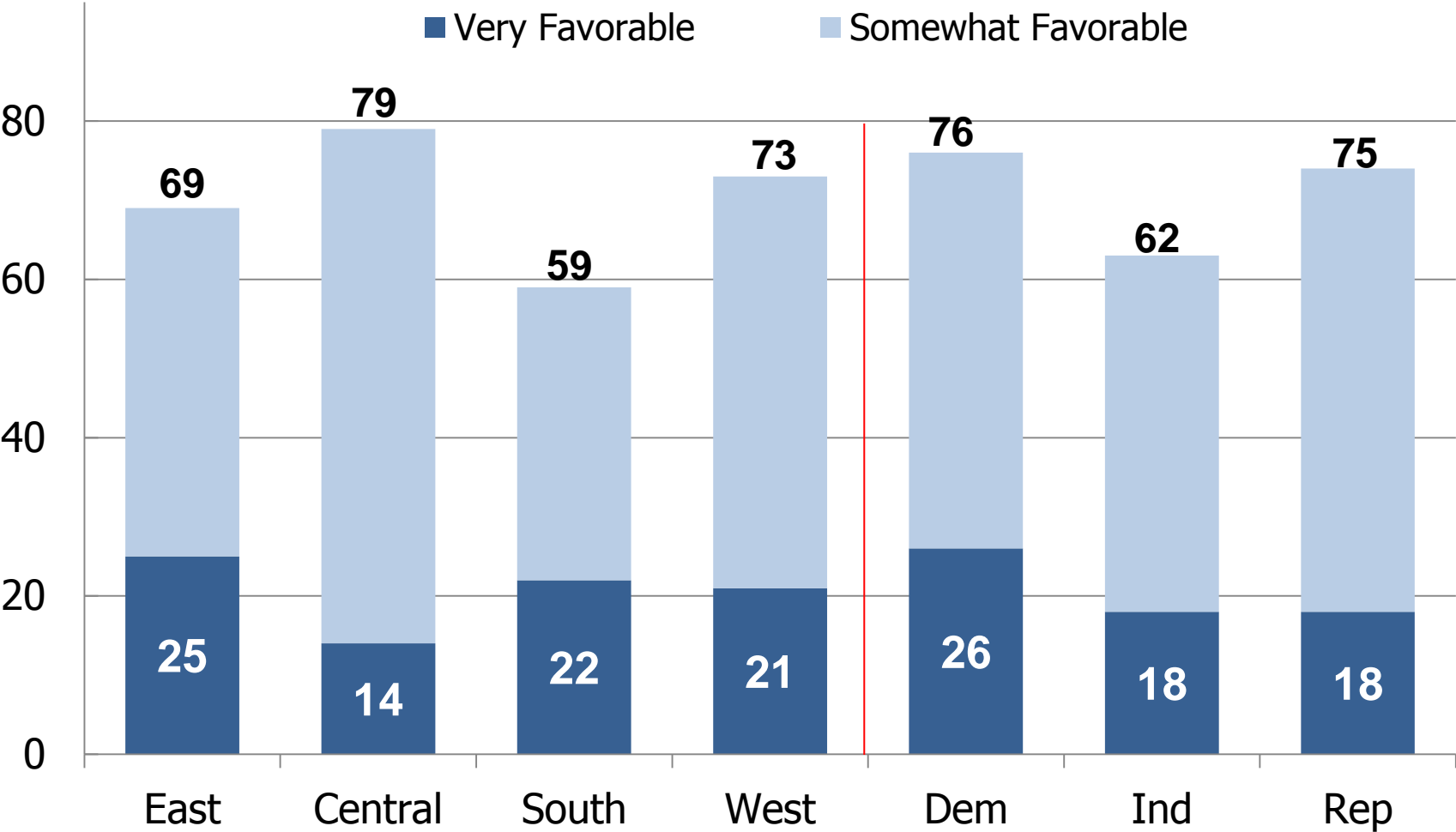
AASCU colleges enjoy much higher ratings with college graduates than with those without college degrees. Whites also rate them higher, with higher shares of communities of color unable to rate them.

Popularity of AASCU Colleges: By Education and Race



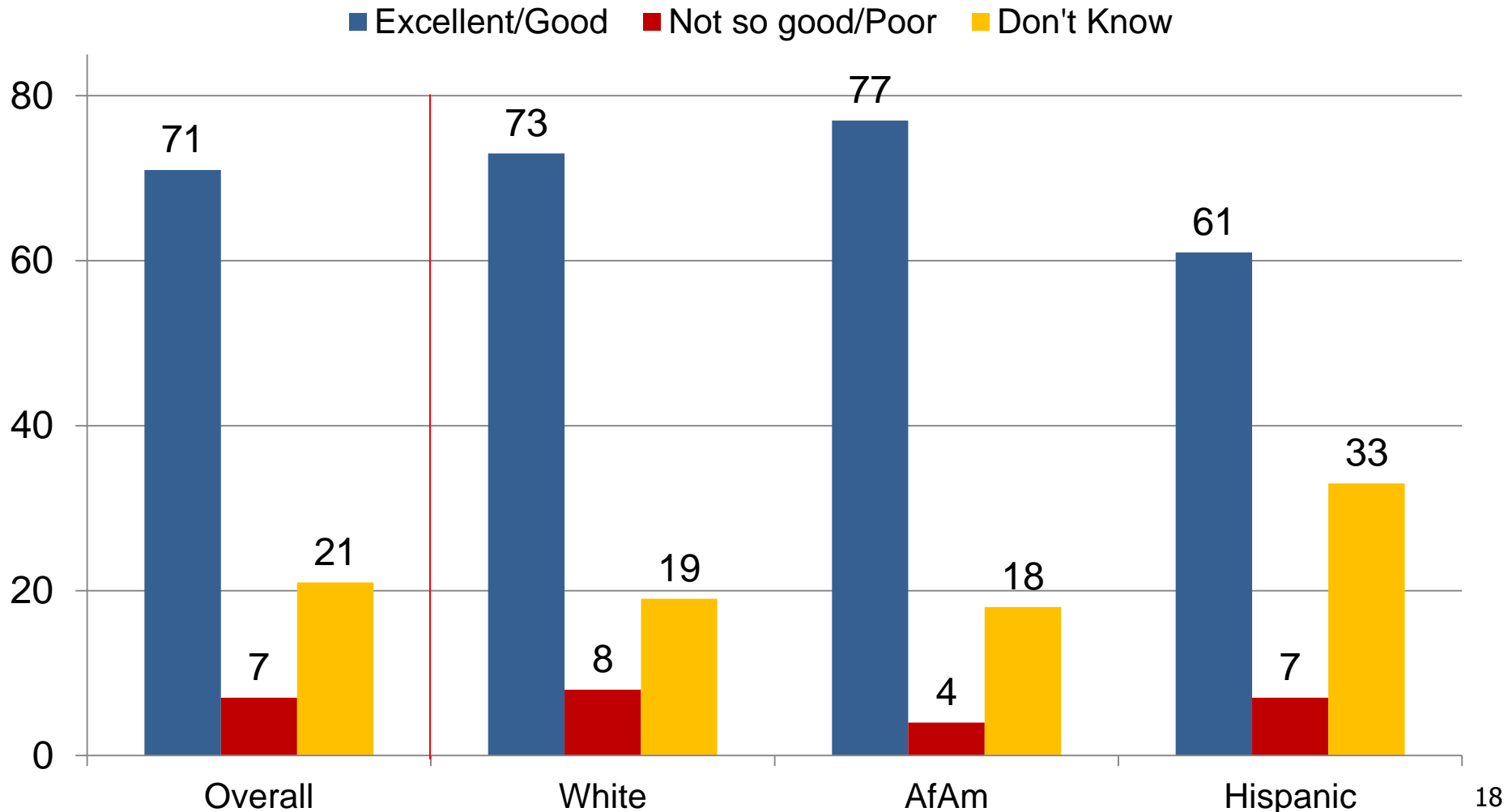
Regionally, AASCU Colleges enjoy their highest ratings in the Midwest, and are rated favorably by strong majorities across regional and partisan lines.

Popularity of AASCU Colleges: By Region and Party ID



Nearly three-quarters of adults (71%) say that AASCU schools provide a good quality education, with 18% rating it as excellent. *A third of Hispanics are not familiar enough with the schools to rate them*

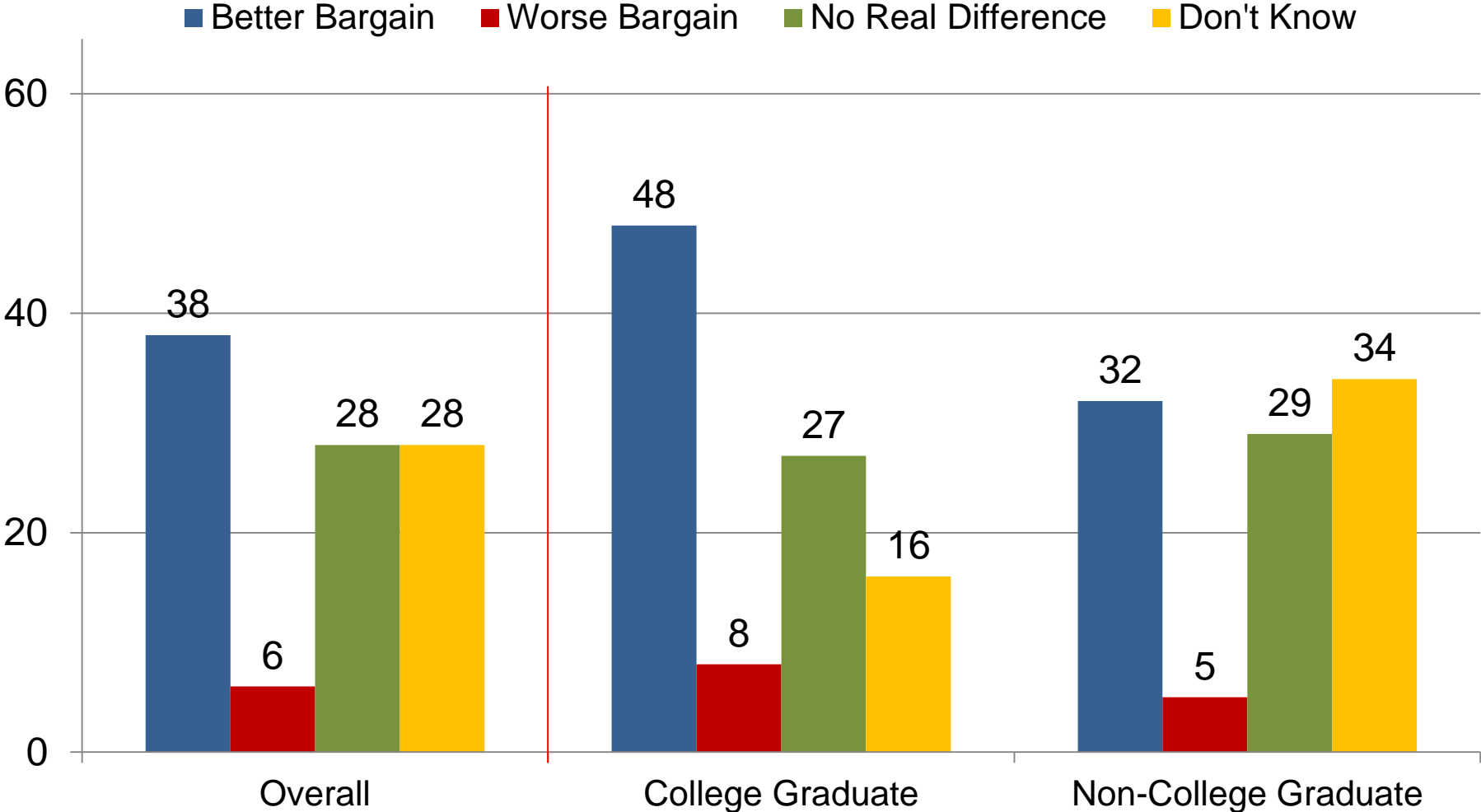
Quality of Education Provided by AASCU Colleges: Overall and by Race



A plurality of 38% see AASCU colleges as a better bargain than most other colleges and universities.

But 56% see no real difference or don't know so real room for improvement

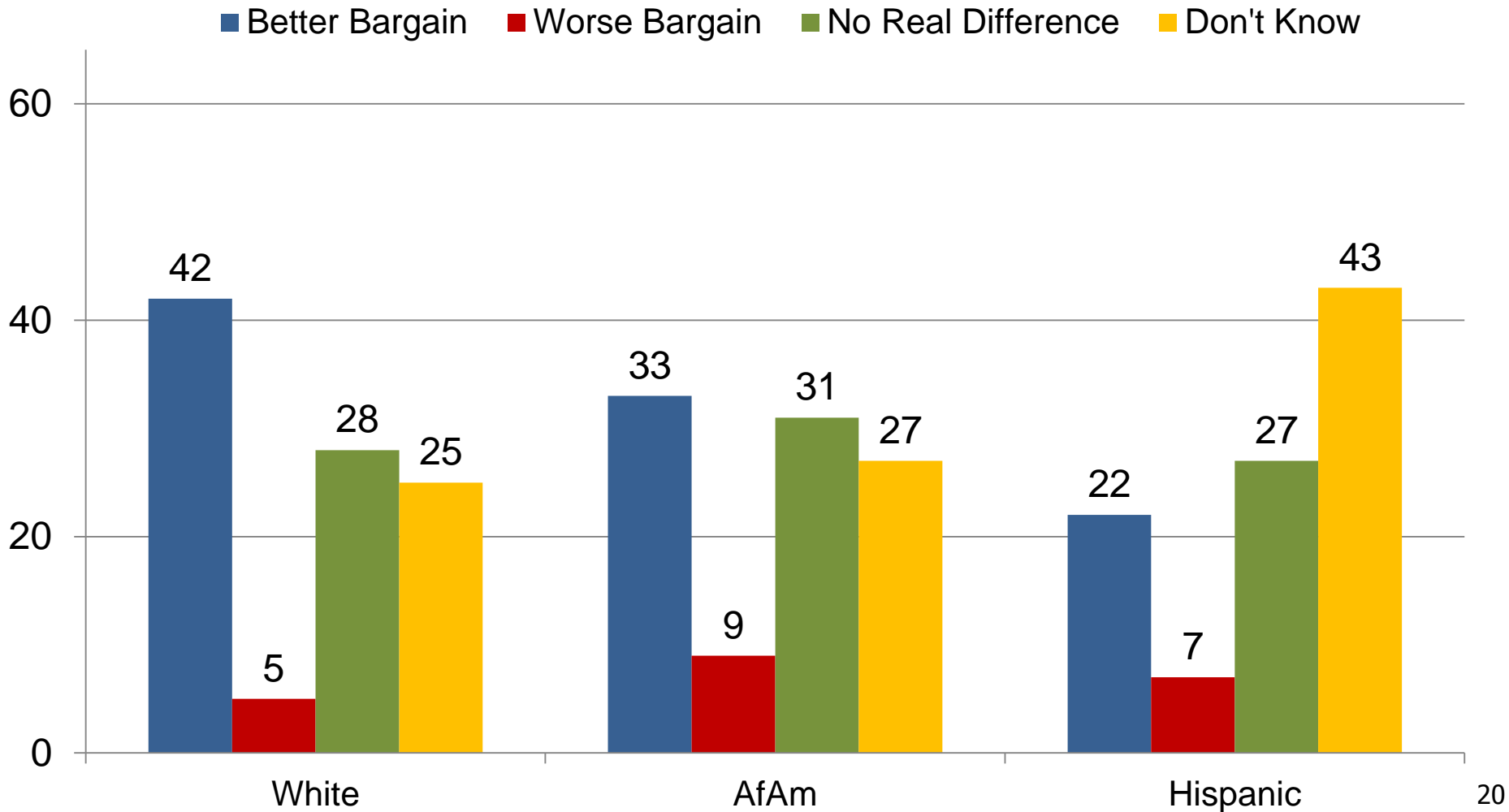
AASCU Colleges - Better or Worse Bargain: Overall and by Education



Whites are more likely than African Americans or Latinos to see AASCU schools as a better bargain.

Among Hispanics, 70% either don't see a difference or don't know

AASCU Colleges - Better or Worse Bargain: By Race



Messaging



How to define AASCU Colleges...

A high-quality education at an affordable price

These schools are an excellent value for students and their families. They offer a high-quality, four-year college education while keeping tuition costs below the national average, so students aren't forced to graduate with massive debt.

Optional addendum (especially for comm. of color and non-college grads):

And because they are affordable, these schools help ensure that students who work hard have the opportunity to go to college.

Of the ten messages tested about AASCU schools, the most effective touted their value and that they helped ensure that those who worked hard could go to college. The “Value” message was especially effective with those who became more favorable of AASCU schools post-messaging.

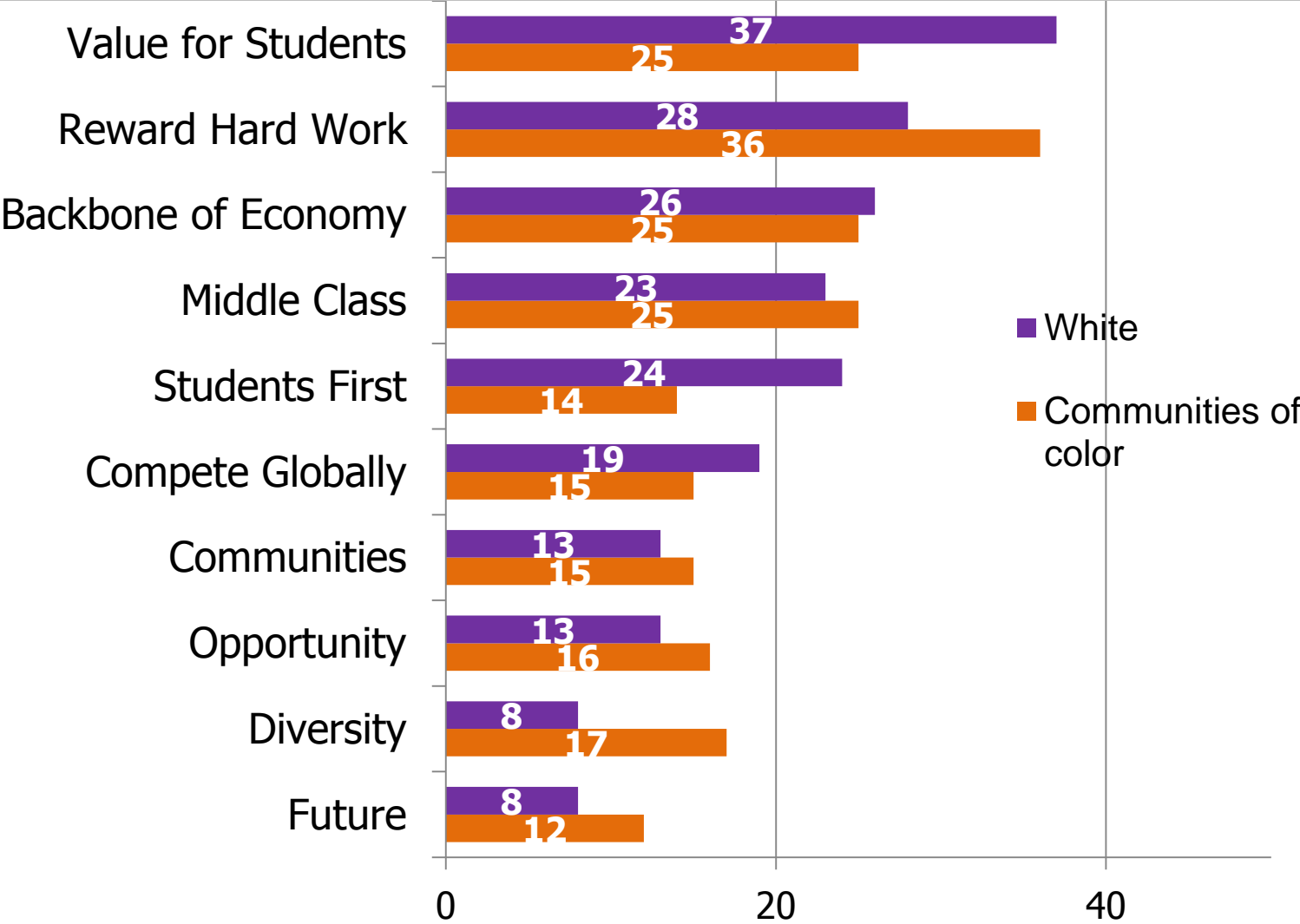
AASCU Messages – Top Tier <i>% ranking message in Top 2</i>	All	Movers
[VALUE FOR STUDENTS] These schools are an excellent value for students and their families. They offer a high-quality, four-year college education while keeping tuition costs below the national average, so students aren’t forced to graduate with massive debt.	33%	35%
[REWARD HARD WORK] Students who work hard should have the opportunity that a college education provides. That’s part of what it means to be American - a brighter future to those who earn it and that includes the affordable college education that these schools provide.	31%	23%
[BACKBONE OF ECONOMY] By providing a quality, affordable education to nearly 4 million Americans each year, these schools are part of the backbone of our economy, helping to produce the skilled workers that America needs to grow our economy and create jobs.	26%	23%
[MIDDLE CLASS] Too many middle class families are struggling trying to make ends meet. These schools help people reach the middle class or remain in it by helping ensure that people aren't buried with debt just to get a college degree.	24%	21%
[STUDENTS FIRST] At these schools the focus is on students. Not only is tuition lower than it is at most other public universities, but these schools also have smaller class sizes and offer more classes taught by actual professors.	21%	24%

Messages less focused on the affordability of AASCU colleges did not fare as well.

AASCU Messages – Bottom Tier <i>% ranking message in Top 2</i>	All	Movers
<p>[COMPETE GLOBALLY] America’s economic advantage rests on its ability to create a skilled workforce. These schools are critical to producing the skilled workers that the US needs to compete with countries like China and India in the global economy.</p>	18%	19%
<p>[COMMUNITIES]These schools strengthen their communities. In addition to offering a quality, affordable education, they also promote investment and involvement in their communities, create skilled workers who drive economic growth, and produce community leaders.</p>	14%	15%
<p>[OPPORTUNITY]These schools give millions of students the opportunity to get a quality education who otherwise could not afford it. As a result, these schools are making the American Dream more achievable for millions of students and their families.</p>	14%	15%
<p>[DIVERSITY]These schools reflect the diversity of backgrounds that make America great. Because of the value they offer, these schools attract students from all incomes and are more racially diverse, exposing students to a wide range of experiences and creating a richer learning environment.</p>	11%	11%
<p>[FUTURE]We are at a crossroads. These schools are critical to giving our children a bright future. We can either support these schools or we can make college only available to families who can afford it. Our children’s future is our responsibility.</p>	9%	12%

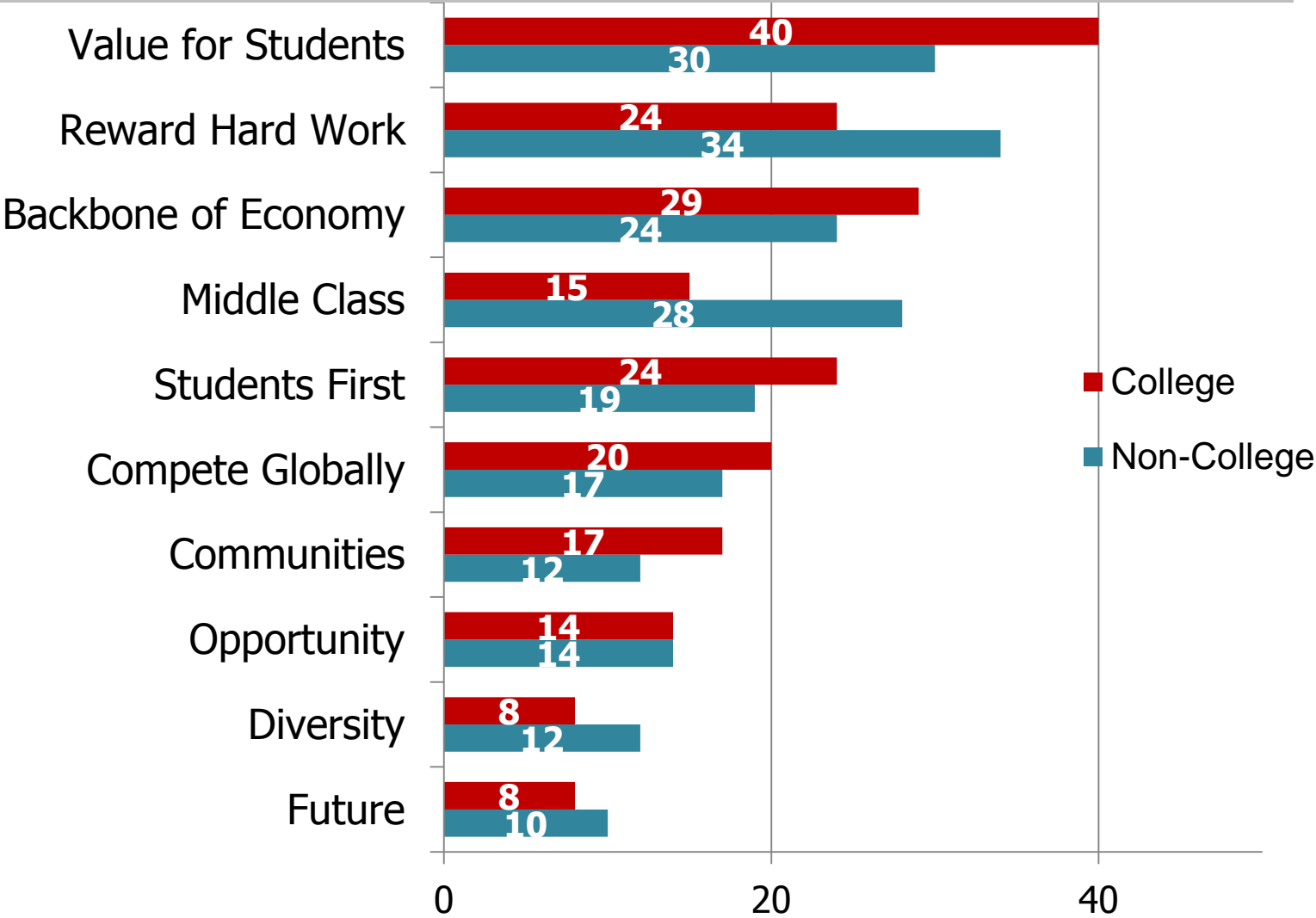
The “Value” message was also the most effective with whites, while “Reward hard work” fared best with communities of color.

AASCU Messages by Race



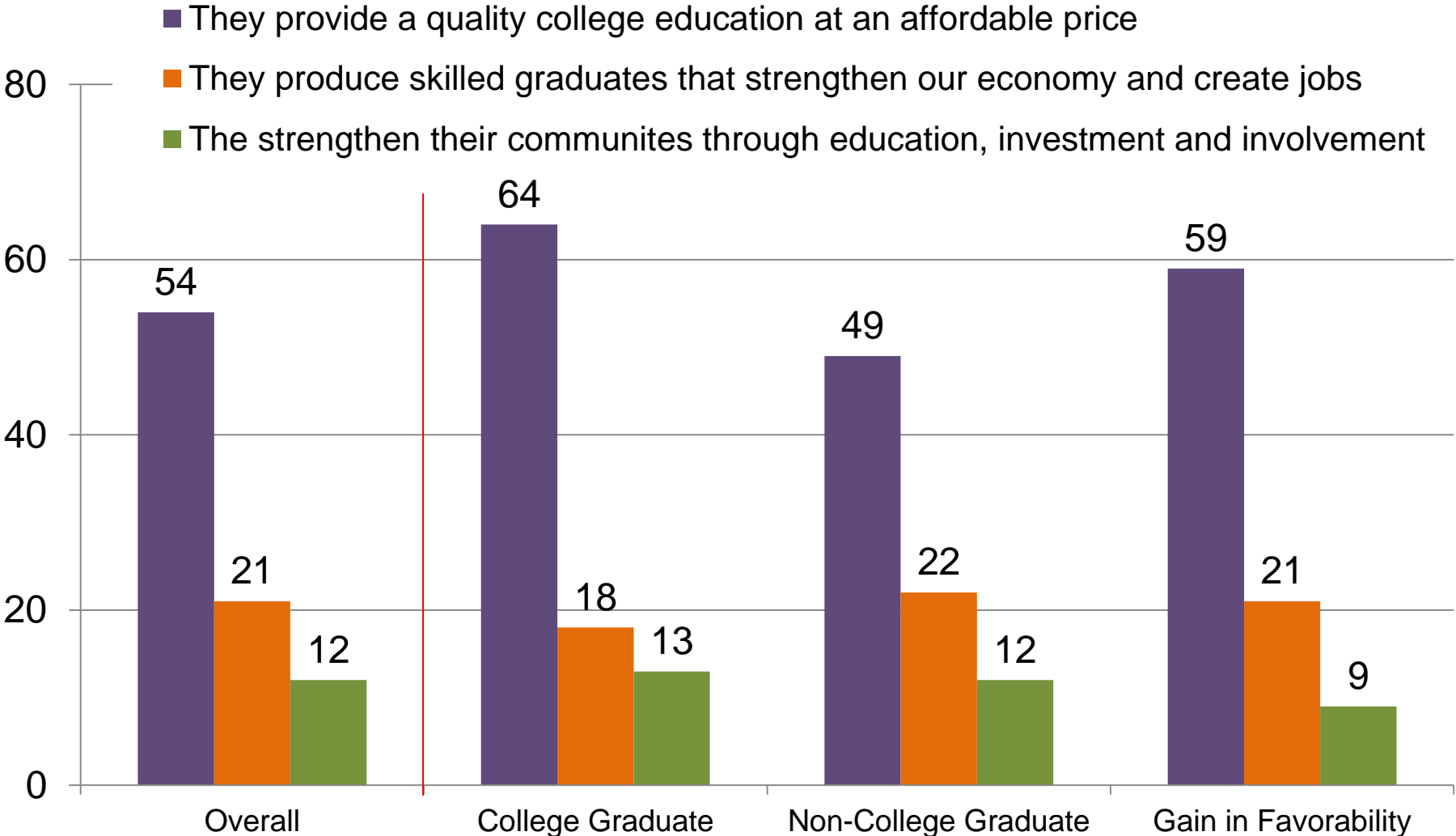
The “Value” message was especially effective among college grads, but among non-college grads, the “Reward hard work” message prevailed.

AASCU Messages by Education



When respondents were forced to choose only between the benefits of value, impact on the economy, and impact on communities, value once again emerged as the biggest selling point of AASCU colleges.

Most Important Benefit - Value/Economy/Community: Key Audiences

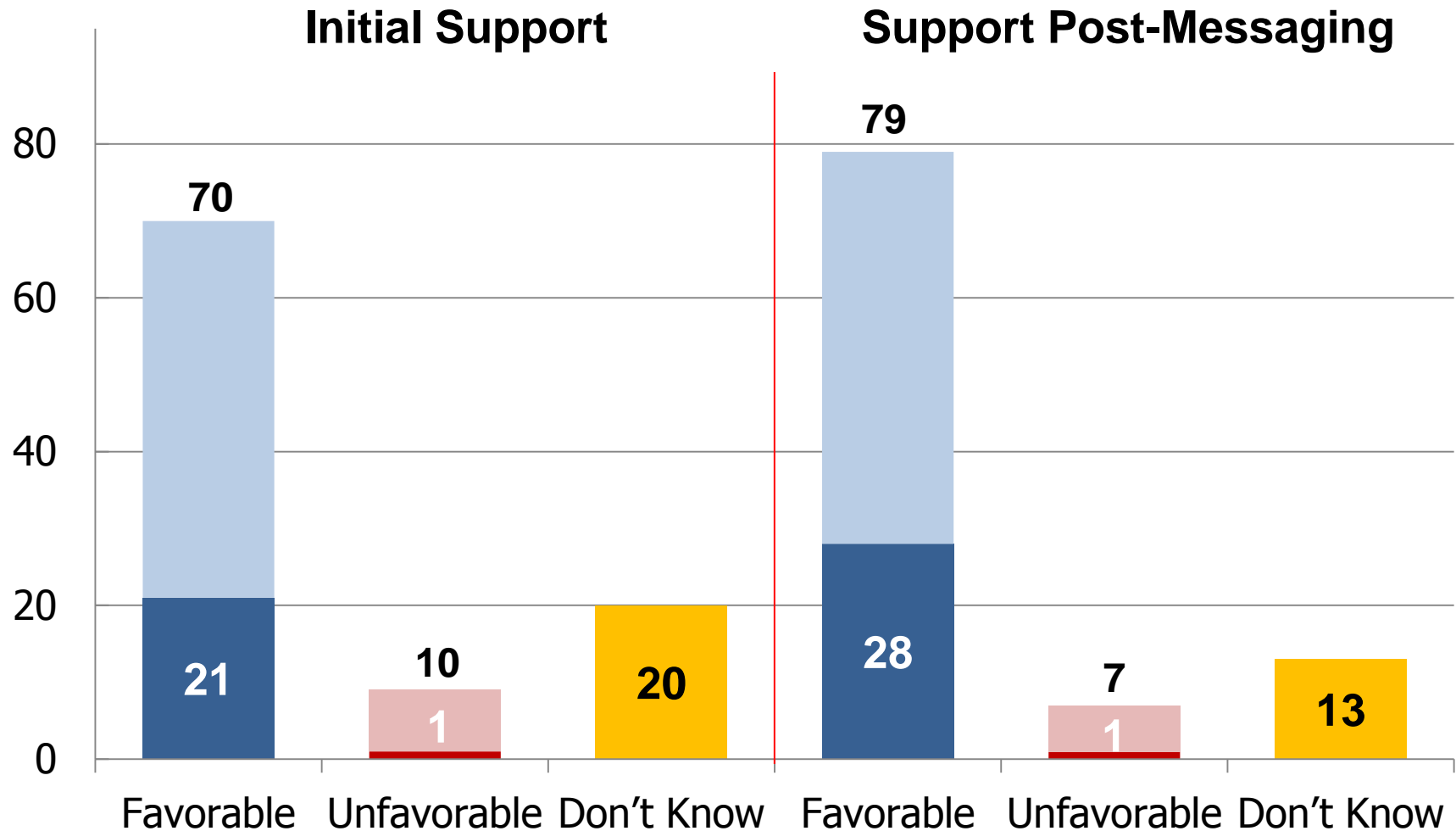


Impact of Messaging



Following messaging, the percentage viewing AASCU colleges favorably overall increased by 9 points to 79%.
The percentage rating them very favorably rose by 7 points

Impact of Messaging on Popularity of AASCU Colleges



The messages were particularly effective among women, Hispanics, those ages 50 and over, and in the south.

Among women, non-college grads and those over 50 are best targets

Groups Most Responsive to AASCU Messages

Shift to Favorable

- | | |
|----------------------|-----------|
| • Female Non-college | +16 |
| • Female 50+ | +16 |
| • Ages 65+ | +15 |
| • South Region | +15 |
| • Hispanics | +14 |
| • Female | +13 |
| • Ages 50-64 | +13 |
| • OVERALL | +9 |

A majority of the open-end responses related directly to affordability (54%), while 28% focused on the quality of education provided.

Most Favorable Impressions of AASCU Colleges – Coded Open-Ends

Cost/Affordability



Quality

Education/Training/Growth



Focus on student/Smaller



Pro-community

Local/Community



Diversity



Other

Nothing/No Opinion



Don't Know/Refused



Other



Conclusions



Conclusions – Current Environment

- The public is split on whether college is worth the cost, but public colleges are overwhelmingly seen as a better value and bargain than private colleges, creating a real opportunity for AASCU schools.
- In 20 years, campuses are likely to be much more diverse. In our poll, communities of color made up a majority of those with children under 18 who are likely to attend college. A majority also had household incomes under 50K, which will create even more demand for affordable options.
- Nearly half say their state should increase funding for public colleges (49%), with just a third saying either maintain current levels (23%) or cut funding (11%). But in an engaged debate, the public is divided. Women under 50 and communities of color are most supportive of increasing funding.
- AASCU colleges are viewed favorably by 70% of the public, putting them just below public colleges overall, and just above private colleges. One in five are unable to rate them, including nearly a third of Hispanics.
- A plurality of 38% say AASCU colleges are a better bargain than most other colleges, but there is significant room for growth here as 56% say there is no difference or don't know.

Conclusions - Messaging

- Of the ten messages tested, the most effective touted the value of AASCU colleges as high quality schools at an affordable price. It was followed by messages on how these schools help ensure an opportunity for those who work hard and earn it. Messages less focused on affordability did not fare as well.
- When respondents were forced to choose only between value, impact on the economy and impact on communities, value once again clearly emerged as the biggest selling point of AASCU colleges.
- The groups that messaging on AASCU had the most positive impact with were women (especially non-college women and those 50+), Hispanics, and those in the South. These are key targets for persuasion.
- After the messaging, when respondents were asked to name the best aspect of AASCU colleges, most gave answers related to affordability, followed by quality.