

Presented to:



NOVA SCOTIA

COMMUNICATIONS NS

Prepared by:

MQO
RESEARCH RECHERCHE

January 26, 2015

***Higher Education - Online Survey
Final Report***

Methodology

This research is based on 600 online interviews conducted throughout the province with Nova Scotian adults aged 18 or older. Data collection took place between January 2nd and January 14th. Results have been weighted to reflect the distribution of people across the province. The demographic profile of respondents is presented in Table 1.

Table 1: Respondent Profile
- All Respondents -

| Demographics | Percentage |
|---|------------|
| Area of Residence | |
| Metro Halifax Area | 39% |
| Cape Breton | 15% |
| Other Nova Scotia | 46% |
| Gender | |
| Male | 48% |
| Female | 52% |
| Age | |
| 18 – 34 | 25% |
| 35 – 54 | 36% |
| 55 or older | 38% |
| Current Employment Status | |
| Employed | 63% |
| Unemployed | 6% |
| Retired | 27% |
| Student | 2% |
| Prefer not to say | 2% |
| Highest Level of Education | |
| High school or less | 18% |
| College | 30% |
| University | 51% |
| Prefer not to say | 1% |
| Annual Household Income | |
| Under \$25,000 per year | 6% |
| \$25,000 - \$50,000 per year | 24% |
| \$50,000 - \$100,000 per year | 34% |
| Over \$100,000 per year | 21% |
| Prefer not to say | 16% |
| Children 18 years of age or under Living at Home | |
| Yes | 28% |
| No | 71% |
| Prefer not to say | 1% |
| Currently Enrolled at a Nova Scotia University | |
| Yes | 3% |
| No | 96% |
| Child/Children Currently Enrolled in a NS University | |
| Yes | 4% |
| No | 95% |
| Prefer not to say | 1% |

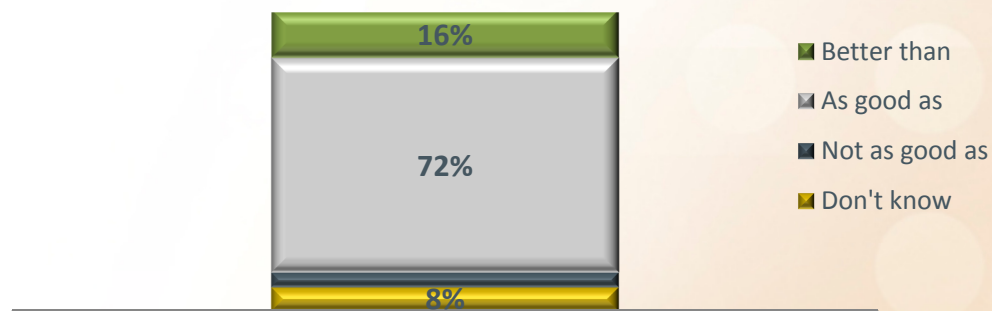
Impressions of Nova Scotia's Universities

Impressions of Nova Scotia's universities are generally positive. Most comments about the first thing that comes to mind when they think of Nova Scotia's universities include: *world-renowned, prestigious, well-respected, great schools, good reputation, and top-notch*. Some of the other positive descriptors commonly expressed by respondents include: *lots of universities, small class sizes/campuses, quality education, and higher education*. A large group of respondents also named the different universities throughout Nova Scotia (i.e., DAL, SMU, SFX, Acadia, CBU, MSVU, Université Sainte-Anne).

Although impressions are generally positive, some respondents did express some negative sentiments. These negative comments include: *NS universities are expensive and overpriced; there are too many universities for such a small province; and the recent Dalhousie Dentistry scandal*.

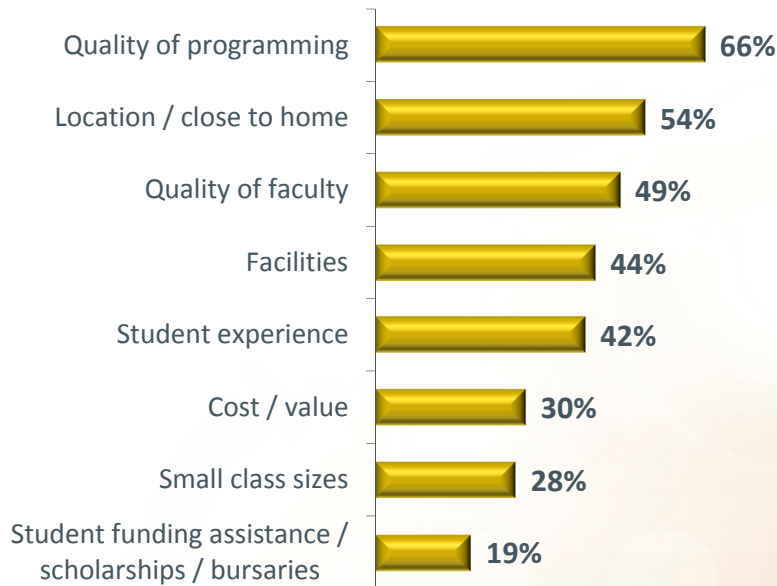
Opinions of Nova Scotia's universities in comparison to other universities across Canada are favourable. The majority of respondents consider Nova Scotia universities to be *as good as* other universities across Canada, while 16% feel Nova Scotia universities are *better than* the others. Only 5% believe Nova Scotia universities are *not as good as* others across Canada.

Nova Scotia Universities Compared to Others across Canada



Quality of programming is the primary reason why respondents feel the way they do about Nova Scotia universities compared to others across Canada. Two-thirds of the respondents selected *quality of programming* as the top reason why they feel this way. Other common reasons selected by half of the respondents include: *location / close to home* (54%) and *quality of faculty* (49%). Females and people from Cape Breton are more likely to say *location / close to home* is the reason why they feel this way.

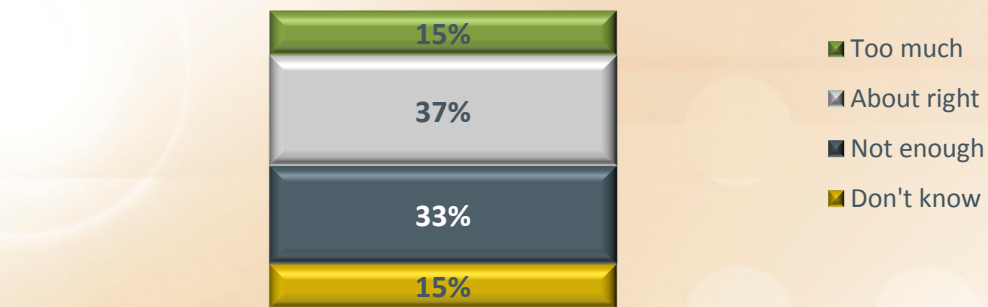
Reasons Why They Feel the Way They Do About NS Universities Compared to Others Across Canada



Support for Government Investment in Nova Scotia Universities

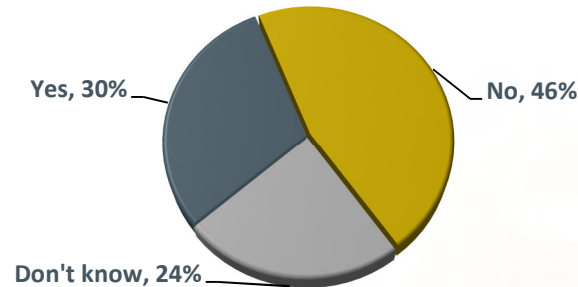
Support for government investment in Nova Scotia universities is mixed. Respondents seem divided on the current funding for post-secondary education, with 37% feeling the current funding of \$500 million each year is *about right*, while 33% feel it is *not enough*. Only 15% believe the current funding for post-secondary education is *too much*.

Current Funding for Post-Secondary Education (\$500 million each year) is ...



An increase in the level of funding for post-secondary education is generally not supported. Slightly less than half of the respondents said *no* - they do not think the level of funding for post-secondary education should increase. Three in ten respondents said *yes* for an increase in funding; while a large percentage of respondents (24%) said they *don't know*. Males, older adults and people from Halifax are more likely to think the level of funding should not increase.

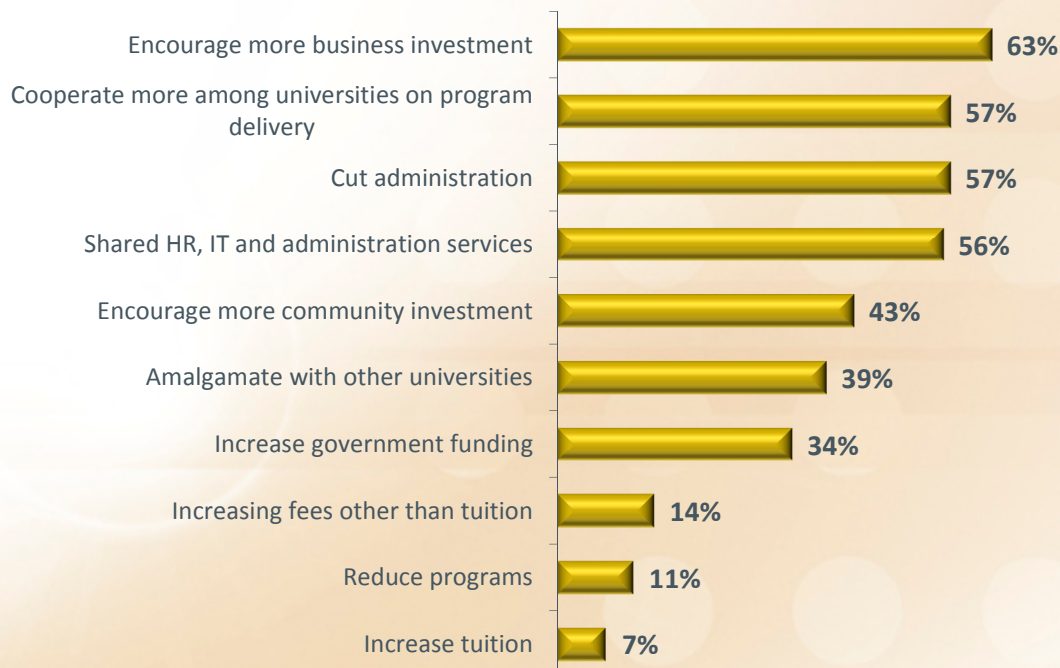
Increase in the Level of Funding - Even if it Requires Cuts to Other Areas of Funding or Increased Taxes



University Budgets

Opinions vary on the ways that universities could increase their revenues. The top four ways that respondents believe can help universities increase their revenues are: *encourage more business investment* (63%), *cooperate more among universities on program delivery* (57%), *cut administration* (57%) and *shared HR, IT and administration services* (56%). Very few respondents believe a good way for universities to increase their revenue is: *reduce programs* (11%) and *increase tuition* (7%).

Good Ways for Universities to Increase their Revenues



Similarly, opinions also differed when asked to identify the **best** way for universities to increase their revenues. *Encourage more business investment* (23%) and *cut administration* (21%) are viewed by respondents as the best ways for universities to increase their revenues. Very few respondents believe the best way for universities to increase their revenue is: *reduce programs* (2%), *increase tuition* (2%) or *increasing fees other than tuition* (1%).

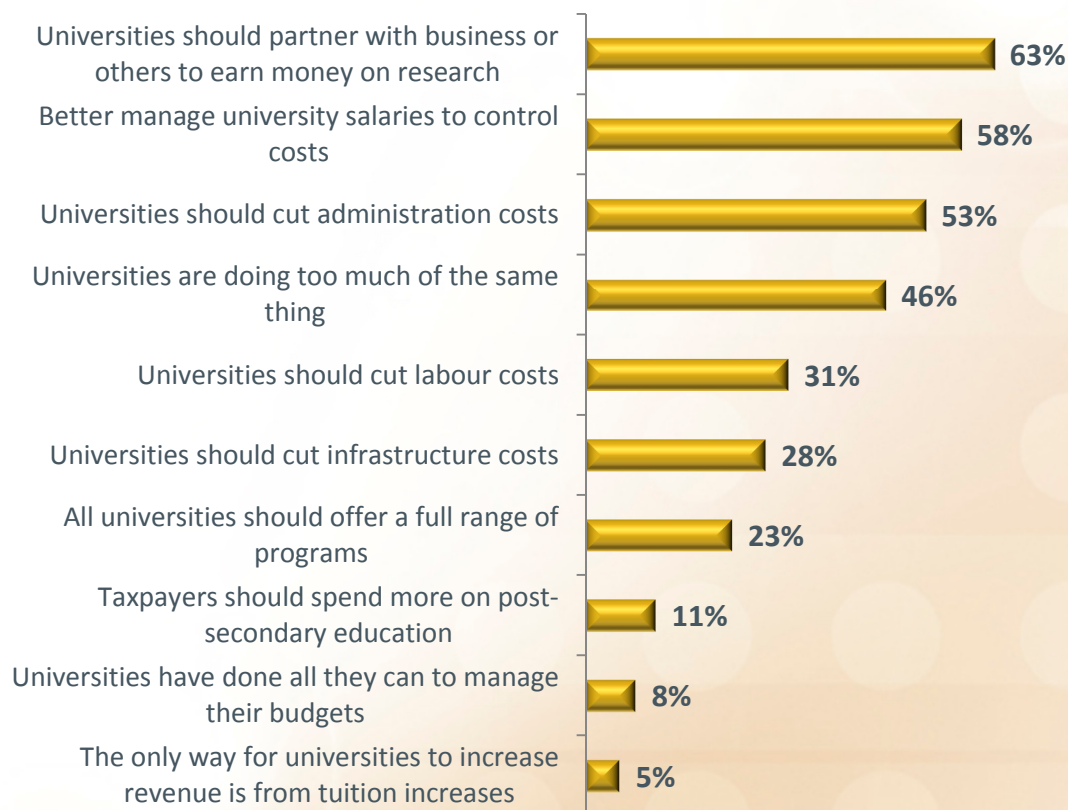
Best Way for Universities to Increase their Revenues



To deal with the increasing operating costs of universities, most respondents agree that universities should partner with business, better manage salaries and cut administration costs. Approximately six in ten respondents agree (that is, provided a rating of 8 or higher) with the following statements: *universities should partner with business or others to earn money on research* (63%) and *better manage university salaries to control costs* (58%). Over half of the respondents (53%) provided a rating of 8 or higher for the statement: *universities should cut administration costs*. Older adults and people from Cape Breton are more likely to provide higher ratings for the statements about universities partnering with business and cutting administration costs.

Very few respondents agree (8+ rating) with the following statements: *the only way for universities to increase revenue is from tuition increases*, *universities have done all they can to manage their budgets*, and *taxpayers should spend more on post-secondary education*. In fact, 82%, 71%, and 64% respectively provided a rating of 5 or less for these three statements.

Level of Agreement on Statements about University Operating Budgets - Top 3 Scores -

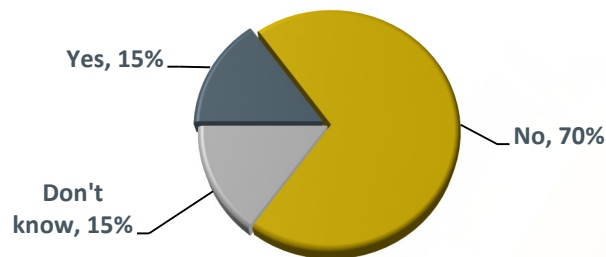


Support for Students / Affordability

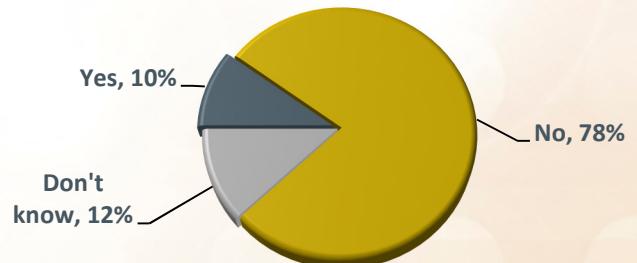
Opinions about student bursaries for both Nova Scotia students and out-of-province students tend to be poor. The majority of respondents (70%) believe the \$1,283 bursary for Nova Scotia students does not go far enough in reducing student debt. Only 15% believe this bursary does go far enough, while another 15% said they don't know. Younger adults, those with higher education and who have children living at home are more likely to say *no*, this bursary does not go far enough.

The vast majority of respondents (78%) think the \$261 bursary for out-of-province students has *no* effect on their decision to attend a Nova Scotia university. One in ten respondents said *yes*, the bursary does make a difference, while 12% said *don't know*. Younger adults and those with higher education and income levels are more likely to believe that *no*; this bursary does not make a difference in their decision.

\$1,283 Bursary for Nova Scotia Students Helps Reduce Student Debt

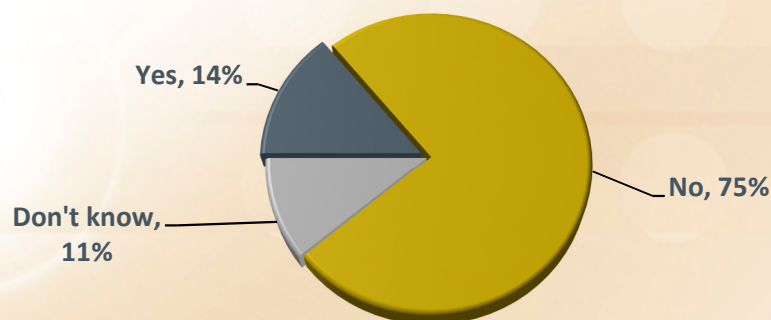


\$261 Bursary for Out-of-Province Students Affects Decision to Attend NS University



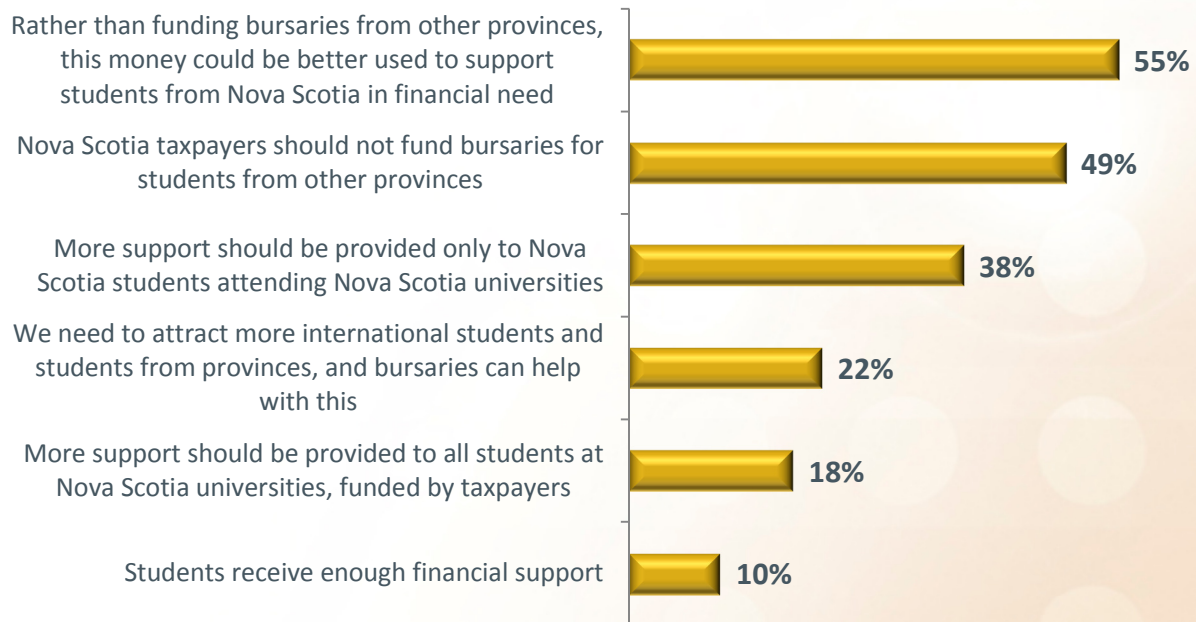
The majority strongly believe that a student bursary, paid for by Nova Scotia taxpayers, should **not** go to students from other provinces who attend university in Nova Scotia. Three-quarters of the respondents said *no*, while only 14% said *yes*. One in ten respondents said they *don't know*.

Student Bursary Paid for by Taxpayers should go to Out-of-Province Students Attending a NS University



In terms of the financial support for students attending Nova Scotia universities, most believe that funding could be better used to support Nova Scotia students in financial need and that taxpayers should not fund bursaries for out-of-province students. Approximately five in ten respondents agree (a rating of 8 or higher) with the following statements: *rather than funding bursaries from other provinces, this money could be better used to support students from Nova Scotia in financial need* (55%) and *Nova Scotia taxpayers should not fund bursaries for students from other provinces* (49%). The level of agreement for the first statement in the graph below is higher among females and those with less than a high school education.

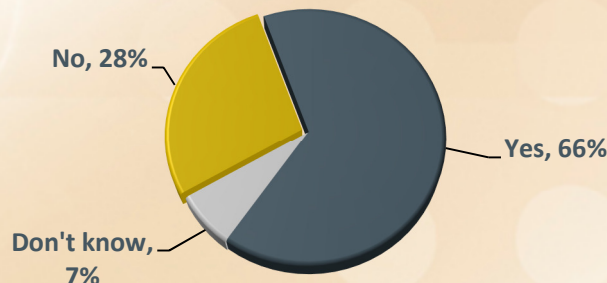
**Agreement on the Financial Support for Students attending NS Universities
- Top 3 Scores -**



Student Debt

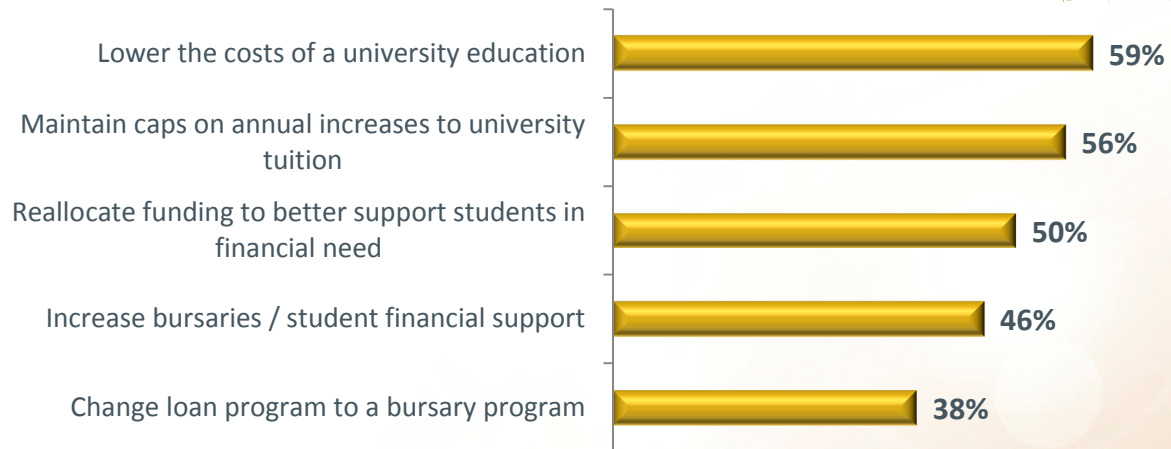
The majority strongly believe an average debt of \$25,000 upon leaving university is too high. Two-thirds of the respondents said *yes*, while 28% said *no*, they do not believe the average debt is too high. Only 7% said they *don't know*. Females are more likely than males to think the average debt is too high.

\$25,000 of Debt Too High



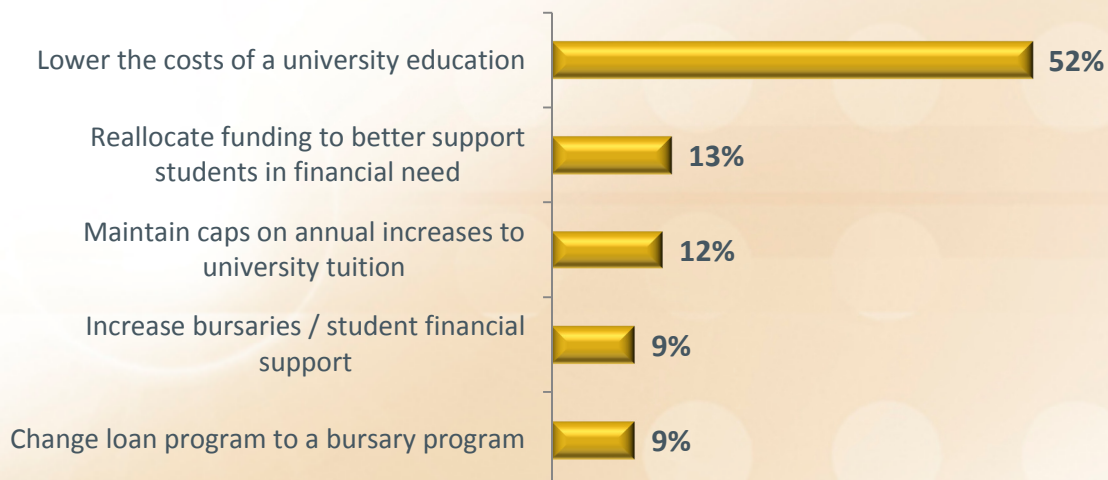
Lowering costs, maintaining caps and reallocating funds are all viewed as being an effective option to help students deal with their debt. Over half of the respondents provided a rating of 8 or higher for each of these three options: *lower the costs of a university education* (59%), *maintain caps on annual increases to university tuition* (56%) and *reallocate funding to better support students in financial need* (50%).

Effectiveness of the Following Options in Helping Students Deal with Their Debt - Top 3 Scores -



When asked to identify the most effective way to help students deal with their debt, ***lowering the costs of a university education*** is viewed as the **most effective option**. Slightly more than half of the respondents (52%) selected this option as being the most effective way to help students deal with their debt. Younger adults and people with a high school education are more likely to select this option. *Reallocating funds to better support students in financial need* and *maintaining caps on annual increases to university education* dropped substantially once respondents were asked to identify the most effective option in helping students deal with their debt.

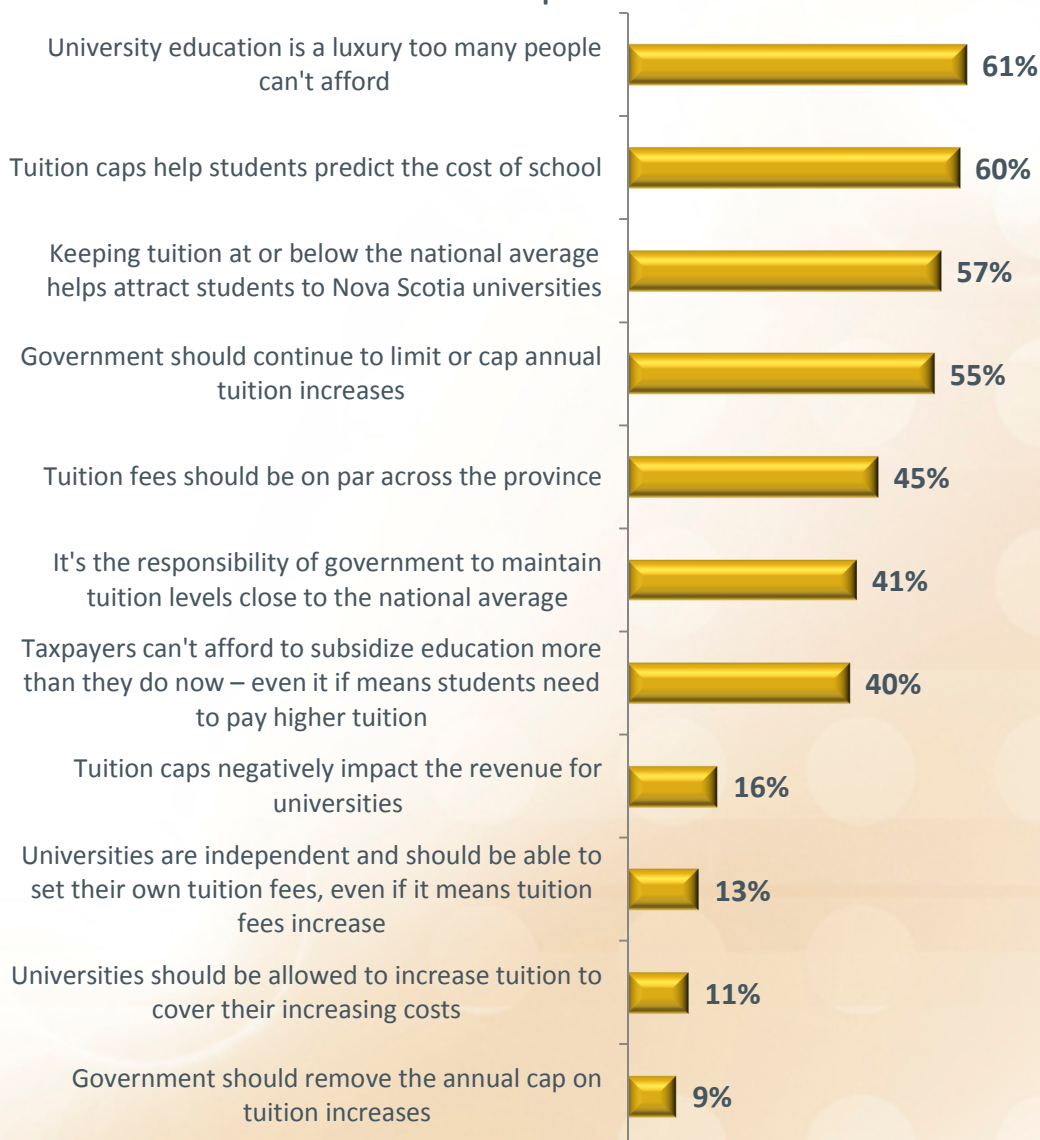
Most Effective Way to Help Students Deal with Their Debt



Tuition

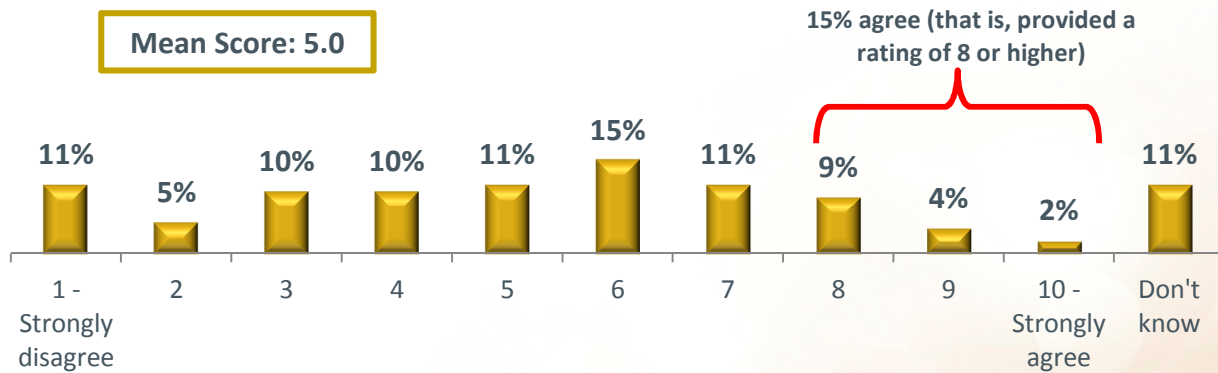
A majority of respondents agree (that is, provided a rating of 8 or higher) with four of the eleven statements about university tuition. Approximately six in ten respondents agree with the following statements: *university education is a luxury too many people can't afford* (61%), *tuition caps help students predict the cost of school* (60%), *keeping tuition at or below the national average helps attract students to Nova Scotia universities* (57%), and *government should continue to limit or cap annual tuition increases* (55%). Females are more likely than males to provide higher ratings for these four statements. In contrast, respondents were less likely to agree with the statements pertaining to *removing the annual tuition caps* and *increasing tuition fees to cover costs*.

**Level of Agreement for the Statements about University Tuition
- Top 3 Scores -**



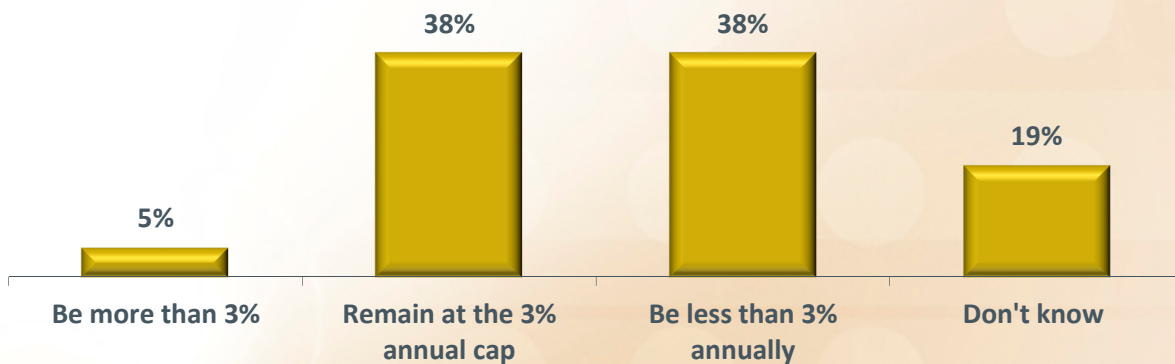
Very few respondents agree that a university should be able to increase their tuition to meet the provincial average, even if it means a larger tuition increase at the institution; only 15% provided a rating of 8 or higher. In contrast, 47% provided a rating of 5 or less; meaning they disagree that a university should be able to increase tuition to meet the provincial average.

Universities should be able to Increase their Tuition to Meet the Provincial Average, even if it means a Larger Tuition Increase at that Institution



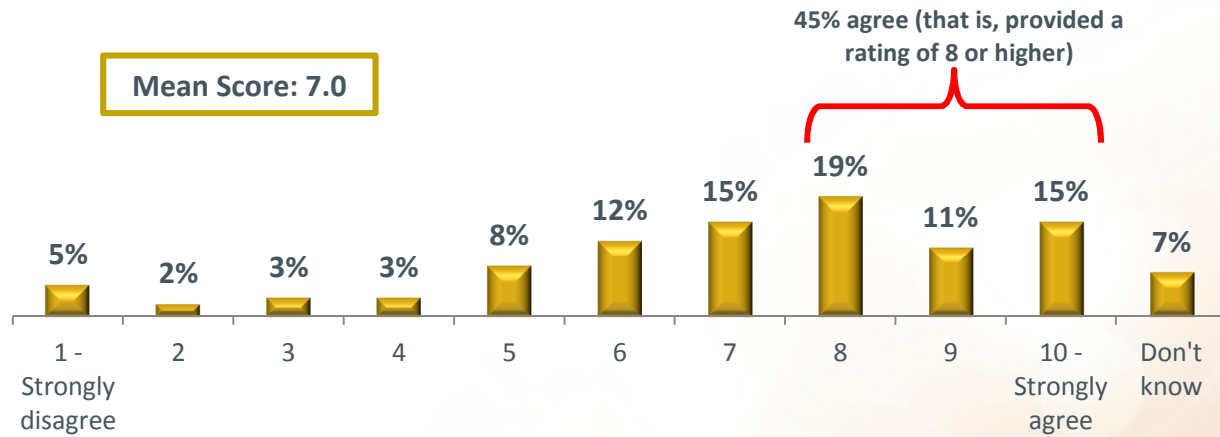
There is mixed opinion as to how much of an annual increase to tuition should be allowed. An equal percentage of respondents feel that annual increases to tuition should either *be less than 3% annually* (38%) or *remain at the 3% annual cap* (38%). Very few respondents (5%) feel that annual increases to tuition should *be more than 3%*. Almost two in ten respondents said they *don't know*.

Annual Increases to Tuition should ...



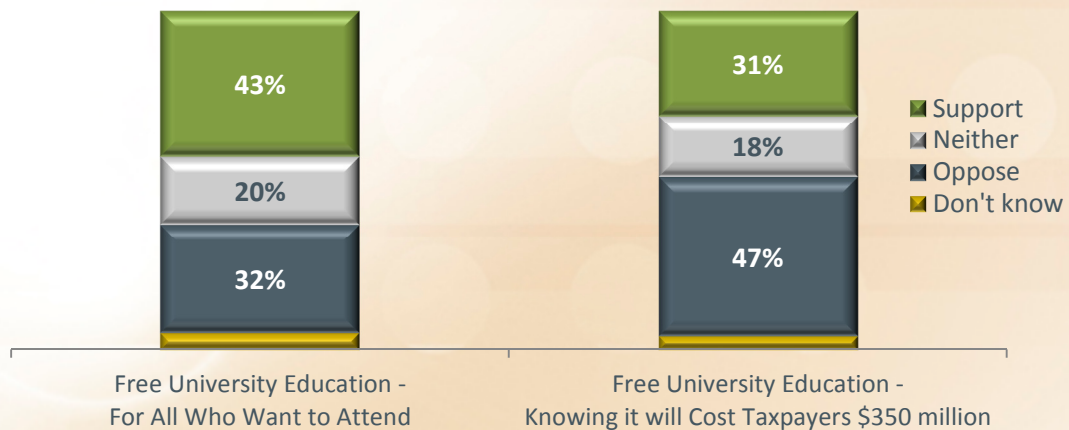
Most respondents agree that tuition levels should be flexible to encourage student enrolment in particular programs to meet job demands. Forty-five percent of the respondents provided a rating of 8 or higher. In contrast, 21% provided a rating of 5 or less; meaning they disagree with tuition levels being flexible.

Tuition Levels should be Flexible to Encourage Student Enrolment in Particular Programs to Meet Job Demands



Support for a free university education to all who want to attend is generally weak, especially once respondents became aware that it would cost taxpayers an estimated \$350 million. Initially, 43% of respondents support a free university education, while 32% oppose and an additional 20% neither support nor oppose. Once respondents became aware that a free university education would cost taxpayers \$350 million per year, those who support a free university education drops by 12 percentage points (down to 31%), while those who oppose it rose by 15 percentage points (up to 47%).

Free University Education

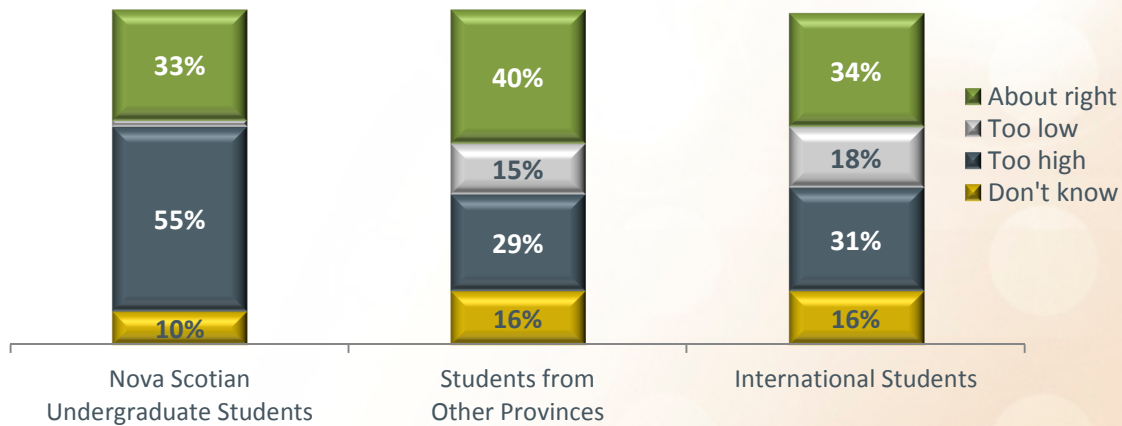


Most feel the average tuition paid by Nova Scotian undergraduate students is too high. Over half of the respondents (55%) believe it's *too high*. One-third said it's *about right*, while very few (2%) believe it's *too low*. Males and older adults are more likely to believe the tuition paid is *about right*.

There is mixed opinions on the average tuition paid by students from other provinces studying in Nova Scotia. Four in ten respondents believe that the average tuition paid by students from other provinces is *about right*, while 29% believe the tuition paid is *too high*. Just 15% thinks it's *too low*. Younger adults and people with lower education are more likely to believe the tuition paid is *too high*.

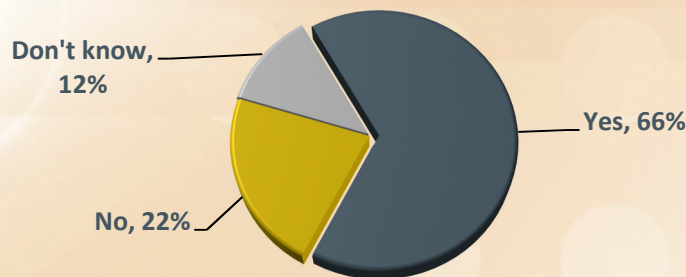
There is also mixed opinions on the average tuition paid by international students studying in Nova Scotia. One-third (34%) believe that the average tuition paid by international students is *about right*, while 31% believes it's *too high*. Only 18% feel the tuition of international students is *too low*. Males, older adults and people with higher incomes are more likely to think the tuition paid by international students is *about right*.

Opinions on the Average Tuition Paid by Students Studying in Nova Scotia



The majority believe it is fair for students from other provinces and international students to pay higher tuition fees to attend Nova Scotia universities. Two-thirds of the respondents feel that *yes*, it is fair for them to pay higher tuition fees, while 22% said *no*. One in ten respondents said they *don't know*. Males, older adults, those with higher education, and people from Halifax believe that *yes*, it is fair.

Fairness that Students from Other Provinces and International Students Pay Higher Tuitions Fees

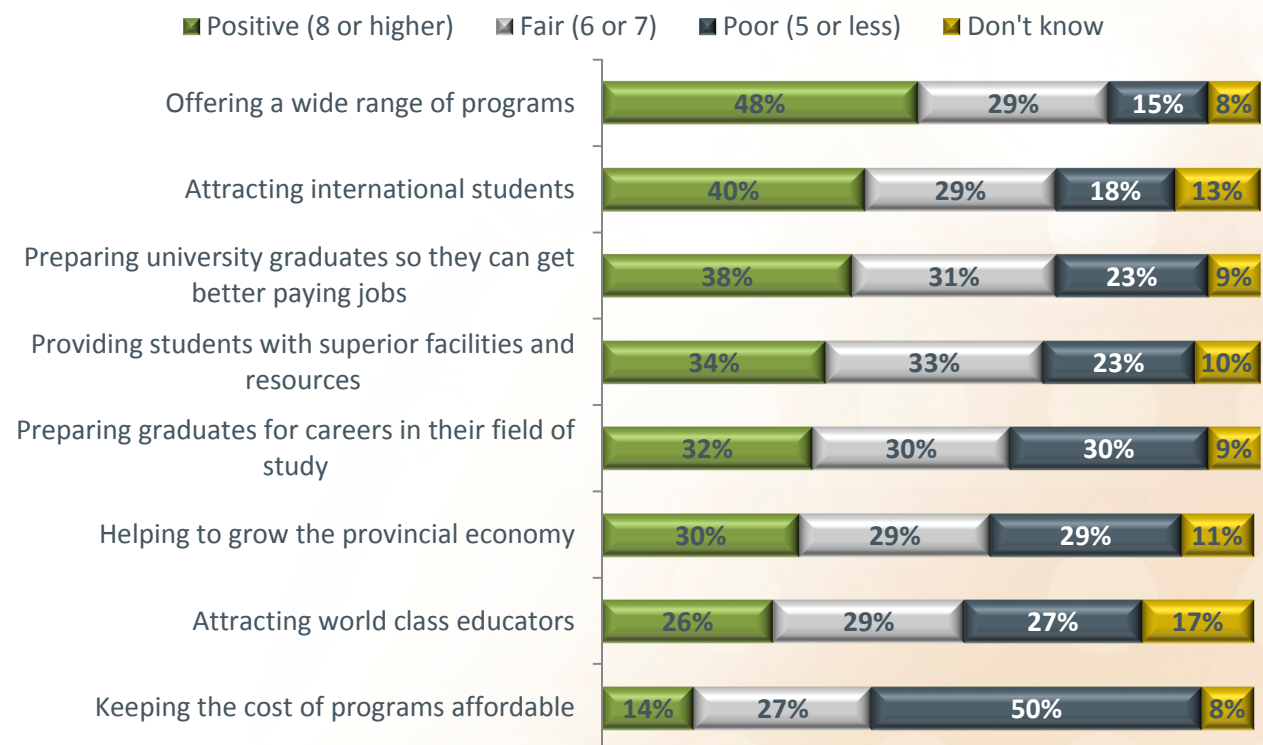


Quality of Education

Nova Scotia universities mostly receive either positive or fair ratings on a majority of the performance attributes. The highest rated performance attribute for Nova Scotia universities is: *offering a wide range of programs*, where 48% provided a rating of 8 or higher. For this attribute, another 29% rated it fair (a rating of 6 or 7 on a 10-point scale). The performance attribute, *keeping the cost of programs affordable*, received the lowest ratings with 50% giving this attribute a 5 or less.

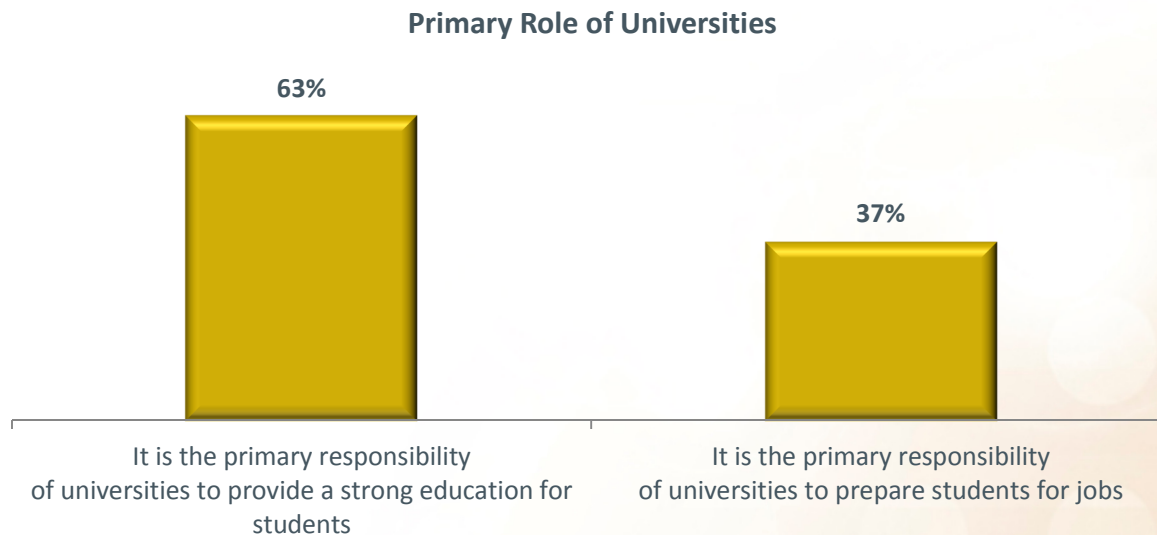
Females are more likely than males to provide higher ratings for the following statements: *offering a wide range of programs* and *preparing graduates for careers in their field of study*.

Rating the Performance of Nova Scotia Universities



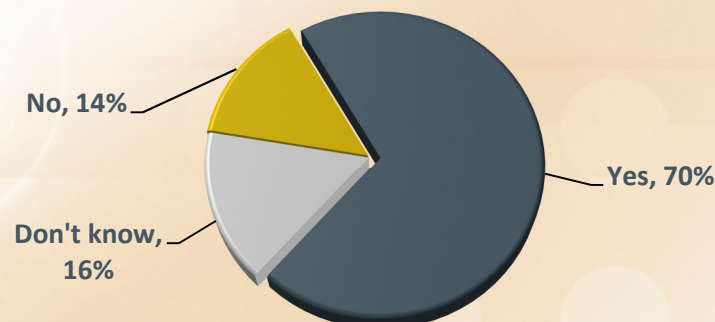
University Role / Purpose

Providing a strong education for students is viewed as the primary role of universities. Respondents were asked to choose one statement that best describes the primary role of universities. The majority of respondents believe that *the primary responsibility of universities is to provide a strong education for students*, with 63% of respondents choosing this statement as the one that best describes the primary role of universities. In contrast, 37% of the respondents believe *the primary responsibility of universities is to prepare students for jobs*.



Interestingly, even though the majority view the primary role of universities as providing a strong education rather than preparing students for jobs, **the majority still believe that all programs at universities should offer an internship or co-op program**. Seven in ten respondents said *yes*, while only 14% said *no*. Sixteen percent of the respondents said they *don't know*. Females, middle-aged adults and those with a higher education are more likely to think all programs should offer an internship / co-op program.

Offering an Internship or Co-op Program



Conclusions

Impressions of Nova Scotia's universities are generally positive. Most comments directly relate to the quality of the universities in Nova Scotia, which include: *world-renowned, prestigious, well-respected, great schools, good reputation, top-notch, quality education, and small class sizes/campuses.*

Seven in ten respondents consider Nova Scotia universities to be *as good as* other universities across Canada. The top reason why respondents feel this way is due to the *quality of programming* offered at Nova Scotia universities.

Support for government investment in Nova Scotia universities is divided, with 37% feeling the current funding is *about right*, while 33% feel it is *not enough*. Most respondents also do not support the idea of increasing the level of funding for post-secondary education.

Upon knowing that universities develop and manage their own budgets, respondents identified four good ways that universities could increase their revenues:

- *Encourage more business investment;*
- *Cooperate more among universities on program delivery;*
- *Cut administration; and*
- *Shared HR, IT and administration services.*

When asked to identify the best way, respondents believe universities could: *encourage more business investment* (23%) and *cut administration* (21%) to help increase their revenues. In addition, most respondents believe that in order to deal with their increasing operating costs, universities *should partner with business or others to earn money on research* (63%) and *better manage university salaries to control costs* (58%).

Opinions on student bursaries are poor. The vast majority of respondents believe the \$1,283 bursary for Nova Scotia students does not go far enough in reducing student debt. As well, the vast majority thinks the \$261 bursary for out-of-province students does not make a difference in their decision to attend a Nova Scotia university. Several respondents do not support Nova Scotia taxpayers funding student bursaries that go to students from other provinces. In fact, most respondents believe this funding *could be better used to support Nova Scotia students in financial need* and that *Nova Scotia taxpayers should not fund bursaries for students from other provinces.*

The majority of respondents (66%) believe an average debt of \$25,000 upon leaving university is too high. The top three options deemed to be effective to help students deal with this debt are:

- *Lower the costs of a university education;*
- *Maintain caps on annual increases to university tuition; and*
- *Reallocate funding to better support students in financial need.*

When asked to identify the most effective option, over half of the respondents believe *lowering the costs of a university education* will help students deal with their debt.

Respondents were next asked to answer a series of questions about university tuition. There is a high level of agreement on the following four statements about university tuition:

- *University education is a luxury too many people can't afford;*
- *Tuition caps help students predict the cost of school;*
- *Keeping tuition at or below the national average helps attract students to Nova Scotia universities; and*
- *Government should continue to limit or cap annual tuition increases.*

Very few respondents agree that a university should be able to increase their tuition to meet the provincial average; only 15% provided a rating of 8 or higher. An equal percentage of respondents feel that annual increases to tuition should either *be less than 3% annually* (38%) or *remain at the 3% annual cap* (38%). Most respondents agree (a rating of 8+) that tuition levels should be flexible to encourage student enrolment in particular programs to meet job demands.

Support for a free university education to all who want to attend is generally weak, with 43% supporting a free university education. This level of support diminishes once respondents become aware that it would cost taxpayers an estimated \$350 million; only 31% support it then.

When respondents were asked for their opinions on the average tuition paid by Nova Scotia students, out-of-province students and international students, opinions were mixed:

- Nova Scotia students: average tuition paid is *too high* (55%);
- Out-of-province students: average tuition paid is *about right* (40%); and
- International students: average tuition paid is *about right* (34%) or *too high* (31%).

Although opinions are mixed for the average tuition paid by out-of-province and international students, the majority of respondents believe it is fair for these students to pay higher tuition fees to attend Nova Scotia universities.

When asked to rate Nova Scotia universities on a variety of performance attributes, respondents mostly provided positive or fair ratings. The highest rated performance attribute for Nova Scotia universities is: *offering a wide range of programs*, where 48% provided a rating of 8 or higher and another 29% rated it fair (a rating of 6 or 7).

The majority (63%) believe the primary responsibility of universities is to provide a strong education for students, with the majority (70%) also believing that all programs at universities should offer an internship or co-op program.